CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

January 1998

TABLE OF CONTENTS

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

SECTION I

PROGRAM OVERVIEW

January 1998

INTRODUCTION

In 1984 the Secretary of the Navy issued an instruction to establish Navy Family Service Centers (FSCs). The purpose of this instruction was to ensure the welfare of Navy members and their families.

Secretary of the Navy Instruction (SECNAVINST) 1754.1 states, “A key consideration in maintaining combat readiness is the retention of trained, experienced Navy . . . personnel and enhancement of their ability to attend to duty with confidence in the welfare of their families.”

The instruction was issued to alleviate some of the stresses on family life, such as prolonged family separations, frequent relocations, and living overseas. It was apparent that the Navy needed to strengthen and expand services to assist Navy members and their families.

This desk guide addresses two major components in Navy FSCs: 1) transition from military to civilian life, and 2) spouse employment. These areas overlap in many ways and are both served by the Career Development and Resource Center (CDRC).[1]

We all experience changes in our lives that require us to transition in one way or another. For some, the change may be adapting to the Navy lifestyle and learning to live and work in a new place. For others, the change may be leaving the Navy, adapting to the civilian lifestyle, and learning to live and work in a new place. Both of these are important transitions that affect a service member’s or family member’s life in general, as well as his/her career. The CDRC is equipped to help its customers in these areas of change.

Why Use This Desk Guide?

The purpose of this desk guide is to assist the person at the FSC who is responsible for managing spouse employment and/or transition. Throughout this desk guide, we refer to this position as the program manager. The desk guide provides a basic informational format for program management that helps you, the program manager, understand and manage the CDRC in accordance with policies and practices that are consistent, effective, and efficient.

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[1]The CDRC is a combination of two core Navy FSC programs: The Spouse Employment Assistance Program (SEAP) and the Transition Assistance Management Program (TAMP). The services and assistance offered by these programs are very similar. Therefore, the management of these programs can be addressed in one desk guide, under the title of CDRC.

Why Use This Desk Guide? (Continued)

Taking on the program manager position can be very challenging. In this role, you are the problem solver and mentor to other CDRC staff members. You are expected to provide high-quality, effective service with limited time and resources. This desk guide will provide you with an understanding of the CDRC as well as what your responsibilities are as program manager.

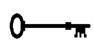
While the desk guide will be especially helpful to a new program manager, others such as FSC Directors and FSC staff will also find it helpful in understanding the program.

How To Use This Desk Guide

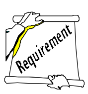
This desk guide is meant to be used as a reference, rather than read from beginning to end. There are seven informational topic areas, shown by roman numerals in the table of contents. You should use the table of contents to locate a desired topic; cross-references are also provided for you throughout the text to help you find the subject in which you are interested.

You'll notice that the following icons are also used throughout the desk guide for quick reference:

INTRODUCTION TO
A SECTION



KEY CONCEPT/
MAJOR POINT



REQUIRED BY AN
INSTRUCTION/
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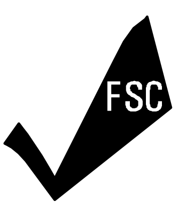
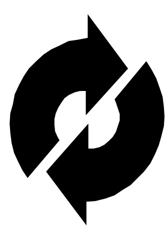
STANDARD

FOR MORE
INFORMATION
(gives a section and/ or page reference to a different part of the desk guide)



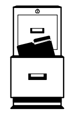
CHECK WITH YOUR
FSC DIRECTOR



SUMMARY/CONCLUSION
OF A SECTION

How to Use This Desk Guide (Continued)

CUSTOMER SERVICES
(one of the five program functions)



ADMINISTRATION
(one of the five program functions)

COMMUNITY INTERACTION
(one of the five program functions)

SUPERVISION
(one of the five program functions)

MARKETING
(one of the five program functions)

The information below explains how the CDRC desk guide is organized and gives a brief overview of each of the seven sections.

How This Desk Guide Is Organized

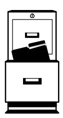
Section I is an introduction to the desk guide and an overview and description of the CDRC. It includes program background; customers; mission, goal, philosophy; and various relationships. This brief introduction may be mostly review, but it should provide a clear picture of what the CDRC is, where it stands in the grand scheme of things, and most importantly, who it serves.

Section II explains how to plan for the CDRC. Planning is always crucial; you can't just dive in and offer services to your customers. You must plan first, then act. In this section, you will get an understanding of how to define the mission or purpose for your local CDRC, conduct a needs assessment, and set local goals and objectives. These planning steps will help you meet the needs of your customers.

How This Desk Guide Is Organized (Continued)

The first two sections of the desk guide overview the CDRC and explain planning for the CDRC. The next logical step is implementation. The rest of the desk guide, Sections III through VII, explain all of the "how to's" involved in implementing the functions for the CDRC. The underlying concept of these sections is that certain core functions (e.g., customer services, administration, community interaction, supervision, and marketing) must be executed in order for FSC programs to work. Some of the topics covered in these sections include how to organize resources; how to complete necessary tasks or activities; and how to ensure quality and evaluate effectiveness.

Section III, the first section on implementation, covers customer services. It discusses all of the services that the CDRC offers Navy members and their families.



Section IV covers the implementation of administration for the CDRC. This key function involves all the administrative duties required for things to run smoothly — from using computers to scheduling your time.

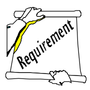
Section V discusses the function of community interaction. The information here covers two different ways of interacting with individuals or groups in the community (i.e., networking and collaboration).

Section VI covers the function of supervision. Supervision examines how to get work done through other people.

Section VII is the last section on implementation. This section explains the function of marketing. It discusses how to research potential customers to determine the best way to inform them about the CDRC.

CDRC BACKGROUND

The changes that the CDRC customers go through are sometimes local and sometimes involve moving to a different geographic location. Regardless, moving from one place to another, one job to another, or one way of life to another is something that every Navy member and/or family member encounters at some point. These are major changes in one's life, and are often very difficult. Because of this, the Navy recognized the need to assist in such major life changes.



In 1991 Congress passed the FY91 National Defense Authorization Act to provide transition assistance to service members and spouses separating from the Navy. Since this time, National Defense Authorization Bills have been passed every year, continuing this essential Navy assistance.

CDRC CUSTOMERS

The CDRC is set up to help eligible customers interested in career development. In the Navy the two major groups of people to which this applies are spouses seeking employment and separating service members.

The category of "spouses seeking employment" includes any Navy spouse or other family member who is an identification (ID) card holder. Navy spouses are important customers because they often feel that they must choose between relocating (with the active duty spouse) or having a desirable job. The CDRC aims to make this decision easier by providing spouses with many different career options.

The category of "separating service members" includes people in the following areas:

- Separatees (voluntary or involuntary)
- Retirees
- Reservists on active duty for 180 days or longer
- Base Realignment and Closure (BRAC) civilians

Realizing that separating from the Navy affects more people than just the separating service member, the CDRC also provides transition assistance to family members. (Transition assistance is explained in more detail on the next page.) Family members are defined as the following people:

- Spouses.

- Children under age 21 (under age 23, if full-time students); also, adopted children and court-appointed wards.

- Qualifying parents and parents-in-law living with the separatee.

CDRC CUSTOMERS (Continued)

Although service members and their families are the direct recipients of the services offered through the CDRC, there are others that benefit as well. People such as Commanding Officers (COs), Executive Officers (XOs), Command Master Chiefs (CMCs), chaplains, department heads, and division officers coordinate their efforts with the CDRC to assist with career development. As you can see, the CDRC involves everyone that is directly and/or indirectly affected by career development.

What Is Transition Assistance?

For separating service members, there are four specific areas of transition assistance that are mandated by public law. These are:

- Preseparation counseling
- Employment assistance
- Overseas relocation assistance
    - Benefits for eligible separating members

The first three areas listed are actual transition services provided at the FSC. As for transition benefits, it is important to keep in mind that your customers can obtain information only. For instance, a separating service member can come to the FSC and find out whether he/she qualifies for transition benefits and what steps he/she needs to take in order to actually receive these benefits. However, the CDRC is not responsible for setting up and ensuring that service members and families **receive** the appropriate transition benefits.

CDRC — MISSION, GOAL, PHILOSOPHY

SECNAVINST 1754.1 states: "FSCs will ensure availability of information to spouses seeking employment. Special attention will be focused on the needs of spouses who are seeking employment as a result of . . . change of duty station."

In addition, (Chief) Naval Operations Instruction (OPNAVINST) 1900.2, states that FSCs will "provide separating members and their families assistance in the transition from military to civilian life." Transition assistance is described as a wide range of services and benefits. The primary goal is that these services and benefits will help the separating member make an informed and effective transition.

CDRC — MISSION, GOAL, PHILOSOPHY (Continued)

The mission of the CDRC is to meet the requirements set forth in these instructions. The CDRC supports the mission of the Navy by providing assistance that positively affects:

- Operational readiness
- Recruiting and retention
- Quality of life

In any Navy operation, 100 percent participation and contribution are expected from each service member. For a service member concerned about his/her career (or concerned about a family member's career), it may be more difficult to meet this expectation. The CDRC provides assistance with every aspect of career development — from the broad scope to the smallest detail. Knowing that the CDRC is there playing an active role in the process can help a service member keep focused on the mission at hand.

Another goal of the CDRC is to meet the needs of both the Navy as a whole as well as its individual members. The idea is that if service members receive the career information and assistance requested, they will be more likely to have positive experiences in their Navy careers. In addition, service members will be more likely to leave active service with a positive impression of military life. These former members who recall military life in a positive light will then become Navy proponents who can positively influence future recruiting efforts.

The CDRC also helps FSCs and commands reach their goals of keeping individuals and families healthy and strong; preventing individual and family dysfunction; and facilitating overall self-sufficiency and personal, family, and community wellness.

The CDRC's assistance should be a plus in the lives of past, present, and future Navy members. This supports the Navy's traditional philosophy of "caring for its own." The CDRC is customer based. In other words, its services and programs are a reflection of the needs of the installation, the commands, and the service member and his/her family.

To "care for its own," the CDRC must be dedicated to customer service with a genuine commitment to help. Furthermore, the CDRC must be characterized by:

- Quality — Providing services and programs that have proven value and worth and meet customer needs.

- Efficiency — Providing practical, courteous, and timely services.

- Cost-effectiveness — Providing services and programs that are cost-sensitive, use resources appropriately, and directly reflect the needs of the installation.

CDRC's RELATIONSHIP TO THE NAVY SYSTEM

The most obvious and immediate relationship is the one the CDRC has with the FSC. As mentioned previously, FSCs were instituted to address the needs of Navy families. FSCs are the central delivery system for service member and family support programs.

The overall management of the CDRC (and all FSC programs) is the responsibility of the Bureau of Naval Personnel (BUPERS). Most importantly, BUPERS interprets law, develops policy, and writes instructions. Program managers and staff at BUPERS also work to ensure that FSC program managers (and staff) receive the support, information, and guidance they need in order to run their programs effectively. This may include things like resources, funding, training, or marketing tools. BUPERS also holds conferences to keep program managers current on issues relevant to the FSC or to specific programs. BUPERS can be an influential connection to senior-level officials and will serve as an advocate to Congress.

Each FSC is an organizational component of the base at which it is located. Therefore, an FSC program manager must work through the chain of command at that particular installation. Your best starting point for most issues is with the FSC Director.

There are other individuals of great importance to the CDRC within the FSC. It is beneficial for you to work closely with all FSC program managers. Many FSC programs have similar functions and can share resources, such as people and computers. For example, you will probably work hand-in-hand with the Relocation Assistance Program (RAP).

CDRC's RELATIONSHIP TO OTHER AGENCIES AND THE CIVILIAN COMMUNITY

The CDRC is farther reaching than the Navy. The CDRC coordinates with the Department of Defense (DOD), Department of Labor (DOL), and Veterans Affairs (VA); state and community organizations; and nonprofit service organizations. The involvement of these groups helps to ensure that customers are aware of and have access to the various types of assistance available to them, whether it be military, government, nonprofit, or commercial.

CDRC's RELATIONSHIP TO OTHER AGENCIES AND THE CIVILIAN COMMUNITY (Continued)

In the civilian community, individuals and groups that may be involved with the CDRC include:

- Corporate and DOD connections in the geographic area
- FSCs from other military services
- Employers
- Mentors in the community
- Business people and community leaders
- Local area organizations
- Chambers of commerce
- Professional associations and local labor departments
- Community service providers (providing the same service)
- Community educational resources
- Support groups
- Local Navy League Chapter

Networking and/or collaborating with these people can benefit the program and help you out in a number of ways. Just to name a few, training sessions can be conducted jointly and attended by a larger group of people; job fairs can be coordinated with the community; resources can be shared; and potential employers can be contacted and informed about the CDRC. The main idea is that limited time and resources can be dealt with while still meeting all of the customers' needs. As a program manager, realize that everyone involved can benefit from such relationships.

SUMMARY

In this introductory section, we have covered the following:

- Why use this desk guide?
- How to use this desk guide
- How this desk guide is organized
- CDRC background
- CDRC customers
- What is transition assistance?
- CDRC — mission, goal, and philosophy
- CDRC's relationship to the Navy system
- CDRC's relationship to other agencies and the civilian community

Section II covers program planning for the CDRC. Planning must be done before you can implement customer services and assistance.

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

SECTION II

PROGRAM PLANNING

January 1998

INTRODUCTION

This section of the Career Development and Resource Center (CDRC) desk guide covers general aspects of program planning. You may be a new program manager at the Family Service Center (FSC), or maybe the program manager position is entirely new to you. Regardless of how long you've been with the FSC or the CDRC, this section will be very beneficial to you. If you have been a program manager for a while, use this section as a refresher. If you feel that you're doing things "the way they've always been done," you may also use this section to stimulate changes, to come up with new ways of meeting the needs of your customers.

Program planning is central to effective program implementation. Whether you are establishing, augmenting, or restructuring the CDRC, planning is the first step you must take.

The general aim of any program is to meet the differing needs of all the customers who request assistance. To reach this goal, you must make some difficult choices about who to serve and how to make the maximum use of limited resources. These tough choices are made easier by regular and thorough program planning.

Some programs require a more extensive planning effort than others. However, it cannot be emphasized strongly enough that time and resources spent at the front end will more than pay for themselves in terms of greater efficiency, relevance, and cost-effectiveness.

Program planning — as the term suggests — is done for individual programs. However, there is usually a strong link to the strategic plan of the FSC. Many program managers must assume responsibility for the goals in the FSC strategic plan that relate to their programs. Individual program planning should be compatible with the strategic plan of the FSC and the mission of the command.

Thorough planning and coordination can bring many benefits to you and the CDRC. Successful program planning:

- Minimizes the element of surprise.
- Maximizes your ability to create your own future and manage change effectively.
- Helps ensure that the CDRC can help the FSC reach its stated goals.
- Helps to identify potential internal problems so that appropriate actions can be taken before negative impacts are experienced.

INTRODUCTION (Continued)

- Allows for a change in the approach from reactive to proactive.

- Boosts individual morale and gives you and other staff members a sense of ownership in program outcomes.

Remember that you learn as much from something that doesn't work as you do from something that does. For this reason alone, it is important to keep a record of program planning "lessons learned" so that future program managers don't have to reinvent the wheel.

Since program needs vary, this part of the desk guide covers the four main areas of program planning:

- Defining the program mission/purpose.
- Conducting a needs assessment.
- Considering the requirements for the Government Performance and Results Act (GPRA).
- Developing goals and objectives.

DEFINING THE PROGRAM MISSION/PURPOSE

The first step for anyone tasked with program planning is defining exactly what the program is supposed to be doing — the purpose of the program. In order to do a good job planning for the program, you must have a thorough understanding about everything the program should provide to Navy members and their families.

For FSC programs, this purpose or mission comes straight from the program's legislation, the implementing instruction, or other policy. As mentioned earlier, you may pull from the strategic plan for the FSC or the mission of the command to come up with the local mission/purpose for the CDRC. Make sure the language/wording you select is customized to fit your locale while still reflecting the overall instruction/program mission.

The following are examples of mission/purpose statements:

- For transition: "To provide assistance to separating members and spouses in the transition from the military to civilian workforce."

- For spouse employment: "To provide comprehensive spouse employment assistance to help spouses gain the information, skills, and support they need."

- For deployment: "To help single and married sailors and their families to successfully manage

CONDUCTING A NEEDS ASSESSMENT

In addition to grasping the mission/purpose of the program, you also need to gain a general understanding of everything that affects the program — the big picture. This means figuring out who and what impact the program. Most importantly, it means taking a good look at who the customers are and determining exactly what they need. The best way to do this is to conduct a needs assessment.

What Is a Needs Assessment?

A needs assessment is a process of collecting and analyzing data from varied sources in order to make effective decisions or recommendations about what should happen next. A needs assessment usually describes the needs of the present and potential clientele for the purpose of making informed program choices.

To make these informed program recommendations and decisions for the CDRC, you need to collect the right data, the right way, the first time. Careful design of the data collection and analysis increases the likelihood that the inferences drawn and the conclusions reached will be accurate. Consequently, the needs assessment is a very important part of program planning.

Why Conduct a Needs Assessment?

The idea behind a needs assessment is to help you get the big picture for the CDRC. The big picture includes both a short- and long-term view of the program. In the current environment, it is often difficult for organizations to constantly adapt to changes that are occurring. Because of this, it is easy for program managers to get into a reactive and stressful mode of doing their work.

To avoid this mode, it will be helpful for you to use your needs assessment information to hypothesize about not only where you want the CDRC to be now, but also where you would like the CDRC to be in 3 to 5 years. This big picture helps you make and prioritize goals and objectives and then to develop the appropriate action steps. Remember that change is going to continue to happen. The idea is to be on the train rather than waiting at the station.

Conducting a needs assessment will help you:

- Determine whether the CDRC is achieving its mission.
- Plan for the CDRC by considering the specific needs of the people requesting services — the customers.

Why Conduct a Needs Assessment? (Continued)

- Determine if needs are being met, if needs of the past have become obsolete, and if needs are arising that need to be dealt with.

- Identify customer areas that have a high service demand and potential customers who are not receiving the CDRC's services.

In general, the needs assessment should tell you if the CDRC services accurately reflect the needs of your customers. Your research information may indicate a new big picture, requiring you to make changes to the CDRC.

When To Conduct a Needs Assessment

You should probably conduct a needs assessment if:

- A formal needs assessment has never been conducted for the CDRC at your FSC.

- A needs assessment was conducted more than 2 years ago.

- There have been significant changes in the size or characteristics of the base/ installation.

Topics Covered in a Needs Assessment

General topics to be covered in a needs assessment include:

- Demographic information.
- External and internal factors affecting/influencing the CDRC.
- Needs of the customers:

  - A knowledge of the current services and a desire to know more.
  - Usefulness of the services.
  - A desire to utilize the services and the barriers to doing so.
  - Changes desired to current services.

How To Conduct a Needs Assessment

There are two major activities in a needs assessment — an external scan and an internal scan. Within these two areas, you collect and analyze data and interpret the data to present the findings.

External Scan

An external scan (sometimes referred to as an environmental scan) is a key activity in a needs assessment. An external scan is a thorough look at how outside factors affect or influence a program, or in this case, the CDRC. This includes a very wide range of factors; some examples are:

- Customer preferences for services
- Emerging competitors for providing services.
- New technology/models.
- Social changes.
- Changes in the economy.
- Cost of living.
- Cost of community services.
- Community organizations that are entering or exiting the locale.
- Support of local community for military personnel.
- Size, location, and surrounding area of the FSC (i.e., overseas, remote, or smaller areas vs. major metropolitan areas serving large numbers of customers).
- Population trends (e.g., age, marital/family status, and children/no children).
- Service delivery trends (e.g., different methods of delivery, periods of increased/ decreased demand, gaps in service delivery, and quality/quantity of services delivered).
- Requirements of the Navy instructions and other directives.
- Mission of the base or commands served by the FSC/program.
- Strategic plans of the Navy, claimants, and command (e.g., Commanding Officer).
- New laws, rules, regulations, and policies.

External Scan (Continued)

Each of these factors should be explored and considered to plan for and run the CDRC. However, your external scan should focus mostly on the first item — customer preferences for services. In other words, the most critical part of the external scan (and your needs assessment) is determining customer needs in terms of services: Do the customers know about the services? Are the services useful? Are there any barriers to using them? Are there any changes that need to be made?

Another crucial part of your external scan is looking at the resources available to you in the community. Community resources should be a major emphasis in the CDRC, since they can provide you with personal support, program development, and opportunities to expand your resources.

The following are a few examples of community resources used by many FSC programs:

- Information resources
- Program development resources
- Training and/or counseling
- Special event resources

Internal Scan

Just as the external scan tells you about outside factors affecting the CDRC, an internal scan (sometimes referred to as an organizational scan) is a thorough look at issues on the inside — within the FSC or the CDRC. Items to consider in an internal scan include:

- Availability of resources and how they are utilized and shared.
- Degree of cooperation or competitiveness and other “atmosphere” issues.
- The structure of the FSC or the CDRC and the roles within.
- Information flow.
- Use of technology.
- Relations with internal and external customers.

Again, all of these issues are necessary for effective program planning. However, determining the availability of program resources is probably the most important step in the internal scan.

Internal Scan (Continued)

In program planning, it is crucial to identify all possible resources. There are generally two schools of thought about resources. Some feel that you should plan for the program first, and the resources will be allocated to the program based on these plans. Others feel that you must first determine what your resources are in order to plan for the program. In lean economic times, it may make more sense to identify your resources first.

For an FSC program, looking to the past seems to be the best way to judge what your resources might be. Of course, using this method to identify resources will give you only a rough estimate of the resources you are likely to have. Certainly other factors, such as the local dynamics of the base, will also play some part in determining resources. For example, a downsizing will obviously affect the availability of resources. The concept is that history will give you a good idea of your resources; you can adjust and refine from this point (depending on the circumstances).

You can use the categories of resources listed below — people, fiscal, and physical/material — to guide your identification (or scan) of the resources historically available.

People Resources

People resources might include:

- FSC staff
- Volunteers:
    - Retirees, spouses, single sailors, teenagers
    - Customers who are receiving (have received) services
    - Employees for after-hours assistance
    - Volunteer organizations
    - Community organizations (profit/nonprofit)
- Military:
    - Temporary duty
    - Limited duty
    - Reservists

Fiscal Resources

In your internal scan, take a look at your fiscal resources (i.e., money available for various expenses). The following are examples of some typical expenses for FSC programs:

- Daily operation
- Training
- Production and printing of training, marketing, and resource materials
- Special activities (e.g., volunteer recognition events, job fairs)
- Travel/conferences

Physical/Material Resources

In addition to people and fiscal resources, you should also take a look at physical/material resources. Examples of these include:

- Telephone and DSN
- Support materials
- Copier or use of copier
- Dedicated computer and software
- Fax machine
- Office supplies
- Audio/video equipment and supplies
- Books and printed resources/materials
- Work and classroom spaces, furniture, and furnishings

Data Collection

We have described external and internal scans as the two broad activities to complete when conducting a needs assessment. We have also mentioned that both of these activities involve collecting data. Data collection, therefore, is an important part of conducting a needs assessment.

The first step in data collection is figuring out from whom to collect the data — identifying the potential customers. The group of people you identify is considered the target population (or target audience). Technically, the target population includes all members of a group who are the subject of the research.

Data Collection (Continued)

Initially, you may want to assess the needs of the FSC's relatively large and general target population. However, the target population for the CDRC is more specific. At some point in your program planning, you will have to prioritize the target audiences for the CDRC and determine exactly who you will serve. It's unlikely you will have enough resources to serve every audience. For starters though, it would be safe to say that the CDRC is interested in collecting data from service members leaving the Navy as well as from Navy spouses.

Data Collection Methods

The next step is deciding which data collection method(s) to use to gather information. The four that we recommend are:

- Research and review of pre-existing data
- Surveys
- Focus groups
- Interviews

Research and Review of Pre-existing Data

The research and review of pre-existing data method is a bit different from the other methods mentioned above. This method simply involves reviewing previously gathered information to determine target population trends. Examples of pre-existing data include:

- Past needs assessment surveys:
    - Base/installation needs assessment
    - FSC needs assessment
    - Navy community needs assessment
- Various records and/or reports:
    - Program records
    - Quarterly reports
    - Quality of Life Management Information System Network (QOLMISNET)

Research and Review of Pre-existing Data (Continued)

- Speeches and presentations by Commanding Officer (CO), Executive Officer (XO), and/or Command Master Chief (CMC).
- Command Representative Program.
- Studies done by other FSCs or programs.
- Materials used by other programs and organizations.
- Information from State agencies and organizations (e.g., chambers of commerce).
- Demographic studies of base and Navy-wide populations.

These sources may provide information on the:

- Needs of the customers.
- Strategic plan of the command.
- Customers' use of, and satisfaction with, the programs and services offered by the FSC to address these needs.

Checking to see whether this information exists and is available may save you lots of time, money, and effort. This method is a relatively inexpensive and effective way to assess trends and may provide you with useful information for an external scan.

However, if circumstances have changed a great deal, the results of your research/review may not address the current status of the CDRC. For this reason, you may choose to use pre-existing data in combination with data collected using a different method. If you choose to do this, the data collected should be weighed against the pre-existing data. Any differences drawn from this comparison will help you to form the conclusions for the data analysis.

Unlike the research/review of pre-existing data, the remaining three methods involve more than a review. These methods are intensive, because data collection tools must be prepared and conducted, and the resulting information must be summarized. With surveys, the data collection tool is a questionnaire; with focus groups and interviews it is a relatively formal series or set of questions.

Research and Review of Pre-existing Data (Continued)

When using these data collection tools, make sure the potential customers (the people from whom you are collecting data) are provided with the following introductory information:

- Who you are (e.g., program manager, member of the FSC staff).
- The purpose of the project.
- Why/how the person was selected.
- What information you are seeking.
- The next steps — what happens once all the data are collected and analyzed.
- Some sort of a courtesy comment, thanking him/her for participating.

Surveys

A survey is a data collection method used to acquire information (e.g., opinions, beliefs, self-reports) from a relatively large group of individuals. A survey normally involves the use of a questionnaire to present questions and record responses from the people being surveyed.

See the Sample Needs Assessment Survey on ***page A-1*** in the ***Appendix***.

Surveys are a convenient method for gathering data from large numbers of people and can provide complete data on exact questions. Surveys are probably the most common and most favored data collection method used in needs assessments. It is a good method to use to obtain information for an external scan. Keep in mind, however, that surveys can be expensive and time consuming. In addition, the response rate is often low.

Conducting a survey can also provide you with a better understanding about the target population's demographics. In other words, it can help you identify more specifically who needs what. In your survey, you may include demographic questions addressing areas such as:

- Age
- Gender
- Marital/family status
- Children (yes/no, how many)
- Active duty, retired, or spouse
- Rank
- Length of time in the Navy
- Length of time in the area
- Relocating, separating, or retiring

Survey Sample Size

Ideally, you would ask everyone in your target population to complete a survey, but obviously, this would take too much time and money. Instead, you need to make a random selection, in numbers sufficient to gain a strong sense of the overall group (target population) and any subgroups. Everyone should have an opportunity to be included; for example, picking names from a hat or going to a prepared list and picking every 10th person.

How do you decide how many people to select? If you are really concerned about getting a random yet accurate sample, you should talk to someone with statistical, technical knowledge. Most often, however, it probably is not necessary to make such a rigorous selection.

Social scientists say that 100 is an acceptable number (of survey returns) for each group about which you want to make estimates. If resources exist to get 400, your estimates could be twice as accurate.

If you are dealing with subgroups (e.g., retired military spouses), then 20 to 30 returns will provide you with relatively stable numbers. Be very cautious in interpreting your data if you have less than 20 returns in a subgroup.

You can generally expect a return rate of 20 percent to 50 percent. To ensure that you get at least the minimum number of returns you need for your sample, you will need to send out more than that number of surveys. This is called oversampling. So, for example, if you want 100 returns, and you are expecting a 20 percent return rate, you will have to send out 500 surveys. There is usually someone in the command who has conducted surveys in the past; he/she can probably give you an idea of expected return rates.

Preparing the Survey

Survey preparation is the first step in using this data collection method. The surveys are then distributed to respondents (using the mail or some other method), completed by respondents, returned to the sender, and analyzed.

First, try to take a look at surveys that proved successful in the past. Then, whenever possible, try to get help preparing your survey from someone who is familiar with or has had training in survey design — maybe a fellow FSC staff member. In any event, the guidelines listed on the following page should help you prepare the survey questions.

Types of Questions to Use In the Survey

There are generally two types of questions that can be used:

- Open-ended questions — These questions accept a wide range of responses. An example might be, "What do you like about the CDRC?" After this question, the respondent is provided with ample space to answer.

- Closed-ended questions — These questions offer the respondent a choice between specified answers (e.g., yes/no, multiple choices). In order to make this kind of question effective, the alternatives must be few and simply stated, and they should follow in a simple, logical order.

Because open-ended questions are like essay questions, they are much more time-consuming to analyze. The data or information from closed-ended questions is much easier to work with and summarize, because there is no lengthy reading or intense contextual data analysis involved. Responses to closed-ended questions can often be computerized, which saves a lot of time.

Tips on Writing Survey Questions

The following are some helpful hints for writing your survey questions:

- Judge each question against: 1) the purposes for which the survey is to be conducted, and 2) the uses for the information the question will generate.

- Be clear and avoid vague wording. Misinterpretation is one of the deadliest threats to accuracy.

- Make the questions specific but short. (Long questions tend to lose respondents, and specific questions are often relatively long. Sometimes there is a tradeoff between brevity and specificity.)

- Make the initial questions easy to answer and nonthreatening. Including difficult or intimidating questions up front can cause the respondent to decide not to cooperate, either by refusing to answer or by not answering honestly. Either choice can throw the required data so far off the track that the survey is invalidated.

- Put the questions in a context that will not influence the answers; permit respondents the opportunity to give the full range of their opinions.

Tips on Writing Survey Questions (Continued)

- Provide symmetric options to avoid biased responses. For example, using a scale of excellent, good, fair, or poor is asymmetric and provides more positive options than negative options. A more symmetric scale would be something like very good, good, bad, very bad.

- Present questions on a given topic in some logical order, so as not to confuse the respondent. Keep in mind that early questions may affect responses to later questions. (Also be careful that early questions do not give answers to later questions.)

- Set up topics in a way that facilitates the flow of ideas from topic to topic, as well as from question to question.

- Provide equity to opponents and supporters on pro/con issues. Put the pro element first on a random half of the questions and the con element first on the other random half.

Focus Groups

A focus group is a data collection method used to acquire responses to a specific topic. With access to the people who have the information needed, focus groups can be a very efficient means of quickly collecting data.

A focus group usually consists of five to nine people. These people work with a focus group leader (usually called a facilitator or moderator) to discuss a specific topic with which all group members are familiar. A typical focus group session runs from 1 to 2 hours. Throughout the discussion, group members express their opinions and attitudes concerning the topic.

Why Conduct a Focus Group?

To be technically accurate, the objective of a focus group is to acquire a set of responses from a group of people familiar with the topic, service, or product being discussed. It is a qualitative rather than a quantitative study. In other words, it provides a feel for important issues but doesn't provide any numbers for judging how widespread a concern or idea might be or how strongly an opinion is held.

Another frequent goal of a focus group is to develop hypotheses to be tested via subsequent surveys. In any event, the questions asked in a focus group are designed to get information about people's experience with or reaction to something. This is another method that would be beneficial for an external scan.

Selecting Focus Group Participants

Focus groups are simply different sets of people that exist within your target population, usually determined by demographic information (e.g., men, women, enlisted service members, officers). When you are collecting data, focus groups can help to ensure that these different groups are represented.

First, you must determine which groups of people you are interested in hearing from. The next step is to select participants that will make up these groups. Each focus group should be made up of people who: 1) feel comfortable talking around one another with no constraints, and 2) can respond to the same questions. For example, most of the time you would not put enlisted members and officers in the same focus group. In addition, people who have used the CDRC and people who haven't used the CDRC would not be able to answer the same questions.

It is also important that focus group participants are selected randomly. All people should have an equal chance of being selected for a group.

Preparing/Conducting a Focus Group

To begin the session, it is important to specify the objectives of the focus group up front to eliminate any ambiguity about why people are there and/or what is being discussed. It is up to you (or the person setting up the focus group) to decide which (or what mix of) questions should be used for the focus group session — open-ended or closed-ended. (See ***page II-13*** for an explanation of open- and closed-ended questions.) As with any data collection tool, questions should be prepared in advance.

In order to get optimal participation, a few other details should be taken care of before the focus group is scheduled to begin. The following are some pointers on focus group preparation:

- Set up the groups about a week in advance.
- Don't reveal too much of the content of the discussion beforehand; you want initial reactions, not prepared statements.
- Use normal-sized chairs and a square or round table; try to make the area as comfortable as possible.
- If you wish to record the session, ask the participants or let them know in advance. Make sure the microphones and tape machine are visible.

Focus Group Facilitator/Moderator Guidelines

The behavior of the facilitator/moderator (i.e., the person conducting the focus group) can also impact the results of the focus group. Listed below are some guidelines that he/she can follow during the focus group session:

- Don't be threatening; assume a passive, gentle, guiding manner.
- The first few minutes are critical for starting the talk flowing; acknowledge every contribution.
- Keep an outline in plain sight and refer to it, but remember that it's not cast in stone.
- Don't reflect your own biases; neutrality is important to get the respondents' views.
- Orchestrate the flow so that ideas piggyback but voices don't.
- Know when to pause and listen.
- Gently turn to quieter people for their responses.
- Use questions and statements that elicit discussion and give people a chance to express divergent ideas.

Focus Group Participant Guidelines

It is also helpful to set some basic guidelines or ground rules for the focus group members to follow. Ground rules deal with behavioral norms that group members can expect from each other during the focus group session. Establishing ground rules should help the focus group run smoothly. It is also a good idea to post the ground rules in the room and keep them in view throughout the focus group session. Some sample ground rules include:

- Talk one at a time in a voice that the whole group can hear.
- Make sure that you are heard from during the course of the conversation, but do not feel you need to answer every question.
- Don't be swayed by the group; voice your own opinion and stand up for it.

Focus Group Participant Guidelines (Continued)

- Get your comments on the table; you can respond directly to what someone says, but avoid side conversations with your neighbors.

- Be as specific as possible without disclosing confidential information.

Interviews

Interviewing is relatively inexpensive and easy. It is one of the most common methods of collecting information. Interviews are usually conducted face-to-face, but they may be conducted by telephone.

To find out about factors that are impacting or affecting the CDRC internally, surveys and/or focus groups may not be appropriate. Talking to people individually may be more suitable. Therefore, interviewing is a good method to use for an internal scan.

The data gathered during interviews are usually more personal, anecdotal, and more detailed than those gathered through surveys. Because you can probe for more detailed response, interview data help reveal the reasons for survey responses. Interviewing influential target population members is a good way to amplify the data collected through surveys.

When collecting data from members of influential target populations (e.g., COs, XOs, CMCs), face-to-face interviews are recommended. These interviews should be of relatively short duration — approximately 15 to 30 minutes. The interviewee should be informed in advance about the interview's purpose. In some cases, it is even appropriate to provide the questions in advance (especially for COs and/or XOs).

How To Prepare and Structure the Interview

Although there should be a standard set of questions for members of like target populations, the interviewer should be prepared to record points of particular concern to the interviewee. If you are conducting interviews to follow up a survey, ask the interviewees the same questions (or questions about the same things) that you asked the survey respondents.

For example, if those surveyed respond that they are not using the CDRC, ask the interviewee (member of influential target population) if they are referring the users to the CDRC. If the interviewee is not making any referrals, ask why he/she is not.

How To Prepare and Structure the Interview (Continued)

A good, structured interview has the following characteristics:

- Prepared in advance (questions)
- Formal in nature
- Fact-finding
- Centers around a predetermined focus

Interview Questions and Tips

Open-ended questions should be used when conducting interviews. (See ***page II-13*** for an explanation of open- and closed-ended questions.) Using open-ended questions does the following:

- Requires more than a "yes" or "no" answer
- Stimulates thinking
- Elicits discussion

In addition to using open-ended questions, interviews allow for clarifying information. You may ask to tape record the interview in order to accurately capture this information. To obtain this information, the interviewer should:

- Ask for specific examples.
- Ask about other people's opinions.
- Ask for definitions of words that could be open to subjective misinterpretation.
- Distinguish opinion from fact.
- Ask for more information if answers are too convoluted and/or technical.
- Paraphrase.
- Repeat the question.
- State, "I don't follow" or "I don't understand."
- Write down the information (take notes), or tape record with the interviewee's permission.

In cases in which a phone interview is conducted, the interviewer should include an introductory segment (see the top of ***page II-11***) and keep the following tips in mind:

- Immediately establish rapport and move quickly to the questions.
- Use simple-to-answer, nonthreatening questions as an ice breaker.
- Don't give the interviewee any time to withdraw from the conversation.

Interview Questions and Tips (Continued)

Whether it is a face-to-face or phone interview, the interviewer should also follow these general tips:

- Remain neutral (dress, posture, tone, pace, vocabulary)
- Keep the focus
- Be positive
- Encourage participation

Sample interview questions are included on ***page A-3*** in the ***Appendix***.

Data Analysis

Once the data are collected, the next step is data analysis. The purpose of completing a data analysis is to summarize and describe the collected data in an efficient manner so that they can be effectively used for practical purposes — to help you start making some of those tough program choices. The written results of data analysis become the foundation of program planning. These results should include a profile of the customer population and its needs, customer feedback about services, and trends outlined by the data collected (including service delivery trends).

The first step in data analysis is deciding which data analysis method(s) you will use to summarize your information. There are many statistically involved methods that you can use to make complex computations and present data trends in elaborate formats. While these can be very thorough, they are probably more than you need for the purposes of your needs assessment.

All you really need to be able to do is summarize your data in a clear and succinct fashion and point out the significant findings. It is still important to determine how you will do this, but try to keep your data analysis methods relatively simple. The information below includes some suggestions on what should be included in your analysis and how you might present these findings.

Data Analysis Contents

When you set out to do your data collection, you had certain information you wanted to obtain from the respondents. The contents of your data analysis, therefore, should include this information — the answers that the respondents provided to you. This information includes the following:

Data Analysis Contents (Continued)

- Demographics.
- A knowledge about current services and a desire to know more.
- Usefulness of services.
- A desire to utilize the services and the barriers to doing so.
- Level of satisfaction with services.
- Changes desired to current services.

This information can confirm (or negate) some of your initial impressions or assumptions about the target population and its needs. Keep in mind the stability of your numbers, given the amount of responses you received. Be very cautious in analyzing the data when you have less than 20 responses in any group (or subgroup) with which you are working.

In addition, when analyzing the data, make sure you understand what you have before you. For example, let's say you conducted a survey targeted toward Navy spouses. Let's also suppose you knew that 90 percent of Navy spouses are women, and you received 50 percent of your responses from men and 50 percent from women. In this scenario, you wouldn't be able to place much significance on your findings, because they would be inconsistent with what was known.

Data analysis can also provide you with a means to organize the information (i.e., your results). For example, the CDRC will pay closer attention to separating service members and spouses than the Relocation Assistance Program (RAP), which will be more interested in those who are moving soon. Distinctions such as these can and should be made in the content of the data analysis.

Data Analysis Procedures

Data analysis means reducing the gathered information to its essential patterns and trends. The two basic procedures for doing this are organizing the data and interpreting the data. These procedures usually involve tabulating the data to derive numbers and deducing the reasons behind the numbers. The measures discussed below present some suggestions on how this can be done.

No matter how you organize and interpret the data, you must be careful. Interpretation of data is not easy, although it may appear to be, and those in charge of data analysis must understand exactly what the data collected say.

Data Analysis Measures

Mean and frequency distribution are two of the most commonly used measures in data analysis. The information on the following page explains these measures and discusses how they can be helpful to you when you are organizing and interpreting your data.

Mean

A measure of central tendency provides you with a typical score that is representative of the group as a whole. The most common measure of central tendency is a mean. The mean is the arithmetic average of all scores.

> **Example:** Eleven people were asked to rate the effectiveness of a workshop on job interviewing skills. They were given a scale of 1 to 5: 1 — not effective; 2 — somewhat effective; 3 — effective; 4 — very effective; and 5 — extremely effective. The numbers below are their responses:
>
> 1 1 2 2 2 3 4 4 4 4 5
>
> In this example, the mean is 2.9.

Frequency Distribution

A frequency distribution provides a representation of how the scores are laid out.

> **Example:** Again, consider the scenario of rating the effectiveness of a workshop on job interviewing skills. This time, 30 people provided an answer to the question. In the illustration below, the top line represents the 5-point scale. The tally marks under each number represent how many times each response was given; this is the frequency distribution.
>
> 1 2 3 4 5

> In this example, the frequency distribution could be summarized as follows:

- 2 people responded with a 1 (6 percent of the responses)
- 7 people responded with a 2 (23 percent of the responses)
- 2 people responded with a 3 (6 percent of the responses)
- 10 people responded with a 4 (33 percent of the responses)
- 9 people responded with a 5 (30 percent of the responses).

Deciding Which Measure To Use

The questions in your study will often define which measure will more accurately represent the data. For the type of information you collect for your needs assessment, you will generally want to use frequency distributions as the data analysis measure. Means are most useful when you want to compare the overall scores of different groups. Just make sure that it is logical to use a mean. For example, let's say you used the following scale in your survey:

1	2	3	4	5
Strongly disagree	Disagree	Not sure	Agree	Strongly agree

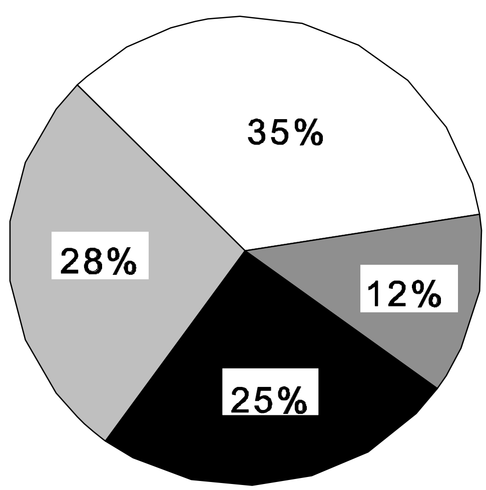
If your mean is 3, then your results aren't telling you very much. This is not a logical measure of these answers. On the other hand, let's say you used the following scale in your survey:

1	2	3
Poor	Fair	Good

In this case, using a mean score to compare groups would be logical.

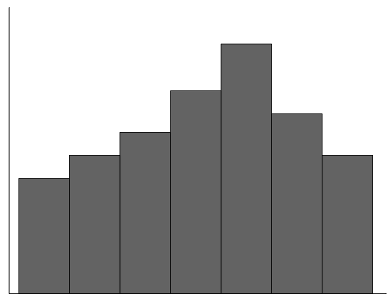
In addition, you can present the resulting information in some neat, understandable fashion. Depending on the data analysis method chosen, findings are often presented in some form of chart, table, and/or graph. Examples of these are presented below:

Pie Chart

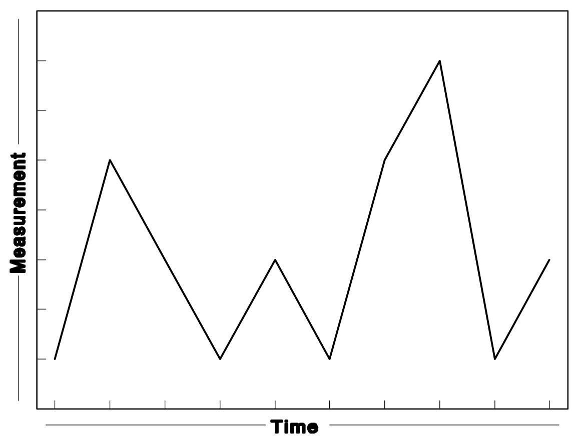


Deciding Which Measure To Use (Continued)

Bar Graph

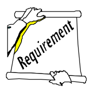


Line Graph



REQUIREMENTS FOR THE GOVERNMENT PERFORMANCE AND RESULTS ACT

Your data collection and analysis efforts will allow you to set accurate and achievable goals and objectives. Before establishing these goals and objectives, however, you must consider the requirements of the Government Performance and Results Act, commonly referred to as the GPRA. The GPRA is driving a great deal of goal setting and performance planning in the Federal government. Congress believes that by meeting the requirements of the GPRA, program performance will improve.



In 1993 the GPRA was enacted to improve the effectiveness and efficiency of programs and spending within the Federal Government.

A key part of the GPRA is an increased emphasis on measurements of program accomplishment, such as:

- Outcomes or results, such as benefits provided to the American public.
- Services provided and customer satisfaction.
- Cost-effectiveness.

The Federal Government has historically measured inputs (e.g., full-time equivalent positions, appropriated funds, revolving funds); activities (e.g., training programs held, job fairs conducted); and outputs (e.g., number of attendees in a training program, number of customers visiting the FSC). The GPRA shifts the focus from inputs, activities, and outputs to outcomes, that is, how the public is served, or the results of Federal programs. This is not to say that the GPRA disregards inputs, activities, and outputs; but rather the GPRA emphasizes outcomes. In emphasizing outcomes, the GPRA focuses on improving customer satisfaction and the cost-effectiveness of the Federal Government. Keep this GPRA focus in mind as you develop your goals and objectives.

DEVELOPING GOALS AND OBJECTIVES

At this point in planning for the CDRC, the mission/purpose has been defined, and there is a clear picture of what you should address based on the needs assessment. Using this information, the next step is to develop goals and objectives for the CDRC.

DEVELOPING GOALS AND OBJECTIVES (Continued)

These goals and objectives should reflect what you have learned about the customers' awareness of the services, the usefulness of the services, barriers to utilizing the services, and desired changes to the services. Any other significant factors resulting from your external and internal scan should also be reflected. You can use all of this information to develop goals and objectives for the CDRC's major functions.

For example, you may want to consider specific things you want to do or items you want to address in any of the following areas:

- Customer services
- Administration
- Community interaction
- Supervision
- Marketing

Based on your findings, you will know where to focus your efforts.

To define the terms broadly, goals are general statements referring to a desired result, and objectives are more specific or detailed statements of goal-related accomplishments. Each of these terms is discussed in greater detail below.

Goal Setting

A goal identifies what you want to do or achieve. For our purposes, setting a "goal" refers to identifying a general goal that is described with an action verb, within a broad goal area that is described with a noun phrase. Some examples include:

	Action Verb	Noun Phrase
■	Increase	the number of TAP classes offered ashore and aboard ships.
■	Decrease	the time it takes to help a relocated spouse find a job.
■	Maintain	the office hours the CDRC is open for walk-in customers.

Goals further clarify the mission of the CDRC by identifying the results to be achieved. Conceptually, goals are statements of refined program purpose in the key results areas of the CDRC. Broad goals can help you think of what the CDRC needs to accomplish, without getting bogged down in issues of measurement and timing.

Goal Setting (Continued)

Here are a few pointers for setting realistic goals:

- Think creatively, but pick only goals that will move you toward the big picture (e.g., those that meet the demands of the local FSC).
- Choose goals that meet external and internal customer needs.
- Identify goals that expand customer resources/services with minimal cost in terms of staff time and resources.
- Concentrate on a few long-range goals, and then decide on the short-range steps needed to reach them (see the information on objectives below).
- Identify goals that will improve services to overlapping segments of the customer population.
- Prioritize your goals; you cannot accomplish all of them right now.
- Focus the priorities on goals and objectives that will have maximum impact on customers and the CDRC.

Objective Setting

Objectives go one level beyond goals in terms of detail. They are more definitive statements of goal achievement with more specific constraints. They provide a framework for the desired results (i.e., the goals). Objectives should be SMART:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**ealistic
- **T**ime-bound

Several components of an objective help to make the objective SMART. These components are:

- Indicator
- Target level
- Timeframe

Objective Setting (Continued)

The heart of an objective is an indicator of goal achievement. An indicator is an index for measuring progress toward the goal. It answers the question of how you will know if the goal is accomplished.

A target level explains how much you aim to accomplish. For example, do you want to recruit 10 volunteers or 2? These components — an indicator and a target level — help to make an objective **S**pecific and **M**easurable.

People often ask when the objective will be accomplished. Will it take 2 months or 2 years? A timeframe will obviously satisfy the requirement for the objective to be **T**ime-bound. A target level and a timeframe will help to determine whether or not the objective is **R**ealistic and **A**chievable.

The important thing to remember is that objectives progress beyond the generalities of goals. Objectives can be defined as clear and measurable expressions of goals. Objectives usually follow this format: "(verb) + (indicator) + (target level) + (timeframe)."

Shown below are some examples of goals and the objectives that further detail their achievements:

GOAL:	Increase the number of referrals to employers.
OBJECTIVE:	Increase the number of employers willing to take referrals by 10 percent by April 199X.
GOAL:	Make more contacts with potential employers.
OBJECTIVE:	Conduct face-to-face briefings with 10 potential employers during the month of July 199X.
GOAL:	Conduct more seminars on interview skills.
OBJECTIVE:	Conduct weekly seminars on interview skills beginning January 199X.

In the first example, the verb and indicator are "increase the number of employers willing to take referrals," the target level is "by 10 percent," and the timeframe is "by April, 199X." In the second example, the verb and indicator are "conduct face-to-face briefings," the target level is "10 potential employers," and the timeframe is "during the month of July 199X."

Sometimes goals or objectives are self-measuring. This means that the concept of measurement is already included in the goal or objective itself. For example a goal to "conduct weekly seminars on interview skills" is self-measuring. In this case, an objective (or an indicator) isn't needed. Another example of a self-measuring goal might be to have 24-hour staffing at the FSC.

Developing Action Plans

Once the goals and objectives have been established, it's time to think about action steps — what needs to happen to achieve the goals and objectives. Implementing an action plan is challenging, especially if you are a new program manager. An important tip for any program manager is to explore all implementation issues first. This means reviewing past successes as well as considering possible (or probable) barriers. Specifically, you should:

- Develop an image of the action plan.
- Identify issues related to implementing the plan.
- Discuss these issues with the appropriate people.
- Outline the next steps according to the plan.

Then you can set the plan in motion and begin taking those action steps. Along the way, it is important to track your progress. Evaluation is key to the success of any action plan. While implementing the action plan, important decisions — and sometimes adjustments — must be made. Evaluating the results of the planning efforts establishes the foundation for improvement.

See the sample action plan template and the sample segment of an action plan on ***pages A-4*** and ***A-5*** in the ***Appendix***.

SUMMARY

In this section of the desk guide, we have covered three main areas of program planning:

- Defining the program mission/purpose
- Conducting a needs assessment
- Developing goals and objectives

This information will provide you with a good framework for planning for the CDRC. At the least, we hope you do not feel overwhelmed. You should have a good starting point and a comfortable understanding of what needs to happen — and who needs to assist you — in planning for the CDRC.

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

SECTION III

CUSTOMER SERVICES

January 1998

INTRODUCTION

Family Service Centers (FSCs) have core functions that must be implemented, for example, customer services, administration, community interaction, supervision, and marketing. This section of the desk guide covers the core function of customer services. The information in this section will help you implement the customer services offered through the Career Development and Resource Center (CDRC).

First, let's overview what customer services are, and what this means for the CDRC and you, the program manager.

The function of customer services generally refers to the assistance you offer to meet customer needs (e.g., computer use, information and referral (I & R), training, and counseling).

Customer Services at the CDRC

It is understood that many groups of people benefit from the CDRC and its services — commands, service members, family members, and others. However, this section addresses the specific services offered to service members and their families. In this case, the CDRC's customers are service members and family members that need assistance with career development issues. These customers may include such people as an enlisted service member who is separating, a spouse who is relocating, an officer who is retiring, or a spouse who wants to pursue certain educational goals.

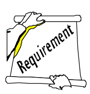
The point must be emphasized that these customer services are available to **all** CDRC customers: Separating service members, spouses, **and their family members**. Rather than repeating this phrase throughout the section, understand that CDRC customer services are also available to those defined as family members (i.e., spouses, children under age 21 (under age 23, if full-time students), and qualifying parents and parents-in-law living with the separatee), unless otherwise noted.

Customer Services at the CDRC (Continued)

Because the CDRC serves many different people with many different needs, a wide range of services is offered. While CDRC services are often grouped in the two categories of transition and spouse employment, there is a lot of overlap in the general area of career development. Nonetheless, there are important distinctions to note. These are covered on the following pages, under these topic headings:

- Transition services
- Transition benefits
- Spouse employment
- Spouse employment benefits

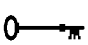
Transition Services



Transition services are mandated by public law. According to (Chief) Naval Operations Instruction (OPNAVINST) 1900.2, these services include preseparation counseling, employment assistance, and overseas relocation assistance.

All members within 180 days of separation (voluntary or involuntary) are eligible for transition services. This eligibility is not affected by the length of service or by the type of service performed. Transition services are also available for up to 90 days after separation.

Transition Benefits



Are transition benefits part of transition services? Transition benefits are **not** part of transition services; these two types of assistance are entirely separate and should not be confused. Transition benefits are temporary in nature and, unlike transition services, are limited to a well-defined group of personnel who are involuntarily separated or retired from the Navy. Eligibility for transition benefits depends on the nature and characterization of a member's discharge.

See Transition Assistance Program Eligibility, included in on and ***A-8*** the ***Appendix***

<u>Transition Benefits</u> (Continued)

In terms of transition benefits, your **only** role is providing separating service members with accurate information, and/or directing them to the appropriate person or place, so that they understand how to proceed. You should also work closely with the I & R specialist at your FSC. (More detailed information on transition benefits is covered on ***pages III-27*** through ***III-32*** in this section; for example, health benefits or survivor benefits.)

<u>Transition Services and Benefits</u>

As a program manager, you are responsible for ensuring that transition services and benefits are in place and available to your customers. When a service member is transitioning, there is not a set process that he/she goes through from beginning to end. During the time between learning the separation date to feeling comfortable in the civilian lifestyle, different service members will have different needs.

There are some required actions that a separating service member must take, but individual cases vary. The point is that not every service member receives the same transition services and benefits. Therefore, you must direct your customers to the appropriate services and benefits and help them meet their individual needs.

Make sure you are current on all transition services, presenting them to your customers like a menu of options from which they can choose. The more you understand about transition services and the better your skills at delivering these services, the more appealing your menu will be.

For detailed breakdown of transition services and benefits, see Transition Assistance Program Eligibility on ***pages A-7*** and ***A-8*** in the ***Appendix*** presents.

<u>Spouse Employment</u>

Many Navy spouses feel that they must choose between relocating (with the active duty spouse) and having a desirable job. The CDRC aims to make this decision easier by providing spouses with career development options.

<u>Spouse Employment</u> (Continued)

When speaking of this area, we must make an important point about the phrase "spouse employment." Many people think that by offering this customer service, the CDRC finds jobs for spouses. While the CDRC is not in the business of finding people jobs, the CDRC does offer tools that are necessary to make informed career choices. These tools may include information on:

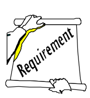
- Education
- Resume writing
- Interviewing techniques
- Job search skills
- Dressing for success
- Job fairs and networking
- Entrepreneurship
- Volunteering

<u>Spouse Employment Benefits</u>

Just as there are transition benefits available to those separating from the Navy, spouses are also eligible for certain benefits. These benefits are:

- Spouse preference
- Volunteering

Spouse Preference



Department of Defense Instruction (DODINST) 1404.11 establishes policy and prescribes procedures for improved employment opportunities for spouses of military personnel stationed in the 50 States, U.S. territories and possessions, and the District of Columbia.

Specifically, this instruction:

- Provides employment preference for spouses applying and referred for certain positions in the competitive service in the DOD components at grade levels GS-8 through GS/GM-15, or equivalent wage system positions, in the 50 States, U.S. territories and possessions, and the District of Columbia.

Spouse Preference (Continued)

- Provides for enhanced employment information and assistance to spouses at levels GS-1 through GS-7, or equivalent wage system positions, who are not eligible for preference.

Since this is a DOD-wide provision, it is not administered and implemented directly by the CDRC. However, as a program manager, it is your responsibility to understand this provision and explain to spouses how they can participate. **Spouses who are interested should be referred to the base Human Resource Office (HRO). Specific policies and procedures are included in the instruction.**

Volunteering

Volunteering is an essential part of providing employment opportunities for spouses. Volunteer work is one option for Navy spouses interested in career development. Volunteering provides the following benefits:

- Excellent training ground for developing and/or learning new, marketable skills.
- Possible career paths for spouses with professional/business skills.
- Reentry into the workforce, with an opportunity to make a career change.
- Primary resource for volunteer jobs with the CDRC or the FSC, especially overseas.

Again, it is your responsibility to understand how volunteering works and how interested spouses can participate.

For more information, see the conditions and procedures included on ***page A-9*** through ***A-11*** in the ***Appendix***.

Implementation of Customer Services

This section of the desk guide will help you understand and implement all the customer services the CDRC offers. These customer services are covered under two major topics:

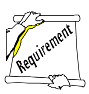
- Employment assistance — career development
- Preseparation counseling

The first topic includes customer services that all CDRC customers — both separatees and spouses — can and do make use of . The second topic addresses customer services used mostly by CDRC customers who are transitioning out of the Navy.

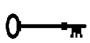
This section will also help you organize your available resources to implement customer services and to ensure the quality and evaluate the implementation of these services. This information is covered under two major topics:

- Available resources
- Quality assurance and evaluation

EMPLOYMENT ASSISTANCE — CAREER DEVELOPMENT



OPNAVINST 1900.2 states that employment assistance be provided to all separating service members and their spouses during the 180-day period prior to discharge.



Employment assistance is the service provided to **all** CDRC customers who are interested in career development. In this desk guide, we refer to this customer service as “career development” rather than “employment assistance.”

The majority of CDRC customers are indeed interested in receiving assistance in career development. This doesn’t just mean helping customers look for a new job. It means identifying all of the options — from educational opportunities, to volunteer work, to the whole job search process.

The type of assistance that CDRC customers receive depends a lot on where they are in terms of career development. Some customers really need to start from scratch — first figuring out their interests, skills, and abilities and then learning about study programs and job opportunities. Other customers know exactly what they want and the strategies they will use to get it.

EMPLOYMENT ASSISTANCE — CAREER DEVELOPMENT (Continued)

Whether brushing up on skills, signing up for a class, or learning how the civilian workforce operates, many customers are interested in receiving career development assistance. This assistance is especially important for those who have been in the military for an extended period of time and for those stationed overseas.

Several methods and tools are available to customers seeking career development assistance. Most of these are available to all CDRC customers, but some are offered specifically to those transitioning out of the Navy. The following methods and tools are discussed in this section:

- Information and Referral (I & R)
- Counseling
- Job fairs
- Automated systems
- Training
- Verification of Military Experience and Training Document (DD Form 2586)

Information and Referral

Information and referral (I & R) is a method used not only by the CDRC, but throughout the FSC. Providing customers with information on a certain subject or referring them to a certain person or location is a large part of any program manager's job. In fact, every FSC staff member does I & R to a certain extent.

Depending on how the CDRC is set up, you can provide information to your customers personally, or you may direct them to a resource area used for the CDRC or for the whole FSC. If you find that you don't have the answers to customers' questions or that they require additional information, you must refer them to the appropriate resource. As stated previously, you should work closely with the I & R specialist in your FSC.

The following are three main areas of I & R about which you should be knowledgeable for the CDRC:

- Information concerning Federal, State, and local programs, and military/veterans' service organization programs.

- Public and private sector employment opportunities.

If you don't already have current and accurate resources pertaining to these areas, the best way to obtain the information is through contacts within these programs. Your State employment commission and other local programs offer information (and sometimes computer software) for those interested in staying in the general area. In addition, military and veterans' service organizations offer assistance concerning benefits, reserves, and educational opportunities.

page A-12 in the ***Appendix***.

If you don't already have contacts within these programs, start making the contacts now. You can begin by talking with other FSC staff members to see what they know about these programs (and who their contacts are).

Placing a call to your State employment commission is another good first step. Your contact there probably has information on other State and local programs. Another excellent resource is your contact at Veterans Affairs (VA). If you don't know who this person is, place a call to the VA today and find out. The nearest library may also have information on these programs.

When customers ask you about these programs, you must be able to provide them with the appropriate information or refer them to the right source.

Entrepreneurship

In addition to the programs mentioned above, OPNAVINST 1900.2 requires you to provide "information to [customers] interested in obtaining loans and grants from the Small Business Administration and other Federal, State, and local agencies."

The best way to assist customers looking to start their own businesses is to provide current and accurate information. For such information, you can obtain materials through your contact at the Small Business Administration (SBA).

It is also helpful to keep a listing of cottage industries (i.e., home-based businesses). Include a disclaimer with the listing, stating that you are not recommending these cottage industries, but are presenting them for informative purposes. For additional information (e.g., requirements for particular lines of work), those interested should contact the SBA. At locations outside the continental United States (OCONUS) where business opportunities may be limited, contact the base legal office for information on local labor laws.

Relocation Issues

Relocation issues are common for CDRC customers interested in career development. Making career decisions (e.g, enrolling in school, accepting a new job) and finding new place to live often go hand in hand. In fact, one may dictate the other. For example, a spouse may know that he/she is moving to Florida, so he/she applies to schools only in the area. On the other hand, a separating service member may have a specific job in mind and is willing to move wherever the job takes him/her.

However, relocating is not always a concern for customers interested in career development. Many customers are planning to stay in the area in which they are currently living. You must have information available for both groups of customers. For those who are relocating, however, it is especially important that appropriate information is provided.

OPNAVINST 1900.2 states that "employment assistance be provided [through] information about geographic areas in which [customers] will relocate . . ."

<u>Relocation Issues</u> (Continued)

Information about different geographic areas should cover the following topics:

- Employment opportunities
- Labor market
- Education/schools
- Medical/dental care
- Factors affecting the cost of living

In addition to providing CDRC customers with such information, you may refer them to the Relocation Assistance Program (RAP) at the FSC. RAP deals with a wide range of relocation issues — everything from employment opportunities to moving logistics.

One of the most helpful tools provided by RAP is a computer information system that has immediate access to every DOD installation worldwide. This system is called the Standard Installation Topic Exchange Service (SITES). SITES provides a variety of facts and figures on installation locations around the world. For example, if a customer is moving to Mayport, Florida, a SITES booklet can be printed (from the on-line information) that contains the Mayport cost-of-living (COL) index, average cost for utilities, etc.

RAP may also help you obtain “Welcome Aboard” packages from other military locations to give to your customers. Every Navy base is required to develop (and distribute) welcome aboard packages. These packages include information similar to SITES, but do not include such detailed facts and figures. Welcome aboard packages usually contain things like maps, real estate information, visitor guides, base newspapers, and information on restaurants and leisure activities.

You can also refer customers to local chambers of commerce and/or to the local Navy League representatives to obtain information on areas of interest.

Whether relocation issues are addressed through information or through referral, providing this assistance to your customers can help them make important career development decisions.

Overseas Relocation Assistance

You may be a program manager challenged with doing your job at an OCONUS site. Customers at overseas locations have special needs and requirements regarding relocation assistance.

Overseas Relocation Assistance (Continued)

CDRC customers stationed overseas must be provided with the same information and assistance as continental United States (CONUS) customers, to the maximum extent possible. In other words, any and all customer services available to customers that are CONUS must be made available to those who are OCONUS.

Overseas relocation assistance obviously requires close coordination with RAP. In addition to any of the services you can provide through the CDRC, you must ensure that all of RAP's services are also provided to your overseas customers.

Career Counseling

Counseling is another method of providing career development assistance. Sometimes customers need some personal guidance before they plan their next steps. In cases like this, the CDRC staff must provide customers with the opportunity for one-on-one counseling.

Many customers need assistance in deciding what to do. A customer may want more input before he/she makes that ever-so-important decision about going to school, getting a job, changing careers, re-entering the workforce, or separating (or retiring) from the Navy. Self-assessment instruments can be very helpful in such cases.

Once customers have a clear picture of their career development options, you can talk with them about general strategies (e.g., educational opportunities, networking, matching qualifications with possible positions, prioritizing and selecting job offers, and volunteering). Customers may also want hands-on assistance with the actual job search process. You can offer to spend time with customers, but make sure they understand that their destinies are in their own hands.

Through individual counseling, you can review/critique resumes or conduct mock interviews. For example, a customer may want help molding his/her resume to fit a specific job he/she is seeking. Mock interviews can also be very beneficial; the first "interview test run" should never be with a potential employer.

Individual counseling sessions may touch on other areas in which assistance is required (e.g., finances, relocation). If so, you may best assist your customers through I & R — providing them with all the information you have and/or referring them to the person from whom or place from which they can learn more. If a customer has a relatively serious problem exceeding the scope of the CDRC, you should refer him/her to the appropriate expert. Do not try to tackle personal problems that go beyond the area of career development.

Job Fairs

Job fairs are another method of providing CDRC customers with career development assistance. They give job seekers the opportunity to see which organizations are hiring as well as what each organization has to offer future employees. Attending job fairs is a good way for job seekers to find the "right match" and to market themselves. Not only is a job fair a great learning experience for both the potential employees and the employers, but participation in one could result in employment.

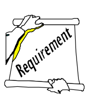
A job fair is an excellent training tool as it provides job seekers with a good opportunity to practice their networking and interviewing skills. Conducting a job fair is a positive activity that is highly visible within the civilian and military community. By interfacing with employers, job fairs can help customers find jobs; this is a high priority within the DOD. In addition, the total number of job fairs that you conduct is reported on your quarterly report. (For more information on reporting, see ***pages IV-26*** through ***IV-28*** in Section IV, Administration.)

The logistics for conducting job fairs are different at every location. To ensure that you follow all of the local laws, check with the local Department of Labor. You should also check with the Legal Office and the Public Affairs Office (PAO) to ensure that job fairs are conducted in accordance with your base regulations. It can also be beneficial to work jointly with other military services when conducting job fairs.

Automated Systems

The CDRC offers three mandated automated systems that are especially beneficial to those requesting career development assistance. These are:

- Defense Outplacement Referral System (DORS)
- Public and Community Service (PACS)
- Transition Bulletin Board (TBB)



According to OPNAVINST 1900.2, you must ensure that "DOD-sponsored automated information systems . . . are in place on-site at the FSC and are being used to their full potential to assist [customers]. Software includes DORS/PACS and TBB."

These automated systems are tools that the CDRC relies on for providing career development/ employment opportunity assistance. Each of these systems, or tools, is discussed separately in the following paragraphs.

Defense Outplacement Referral System/Public and Community Service

The Defense Outplacement Referral System (DORS) is a career development tool used by CDRC customers. DORS is a DOD-developed, automated program designed to release “mini-resumes” to thousands of employers nationwide — civilian employers, organizations, and other employment entities. Employers then have access to the mini-resumes specifically matching their employment needs. Neither the potential employee nor the employer has to worry about this matching process; an outside organization takes care of matching job qualifications with job needs.

Public Law 102-484 (FY93 Defense Authorization Act) allows selected service members to retire with less than 20 years of active duty service if they register for public or community service employment. Members interested in public or community service employment can use Public and Community Service (PACS), an automated database set up within DORS. For early retirement, an applicant must register in PACS; however, there is no requirement to take a PACS job. As with DORS, selected public and service community organizations can access the PACS database and obtain the resumes of separating/retiring service members.

At 62, members who have 20 years combined active duty and public service time will be given credit for a 20 year career for retired pay purposes. However, public service years are only counted if they occur between the time immediately following discharge until 20 years from the start of military service.

To make use of these automated systems, CDRC customers must fill out a DORS/PACS application (DD Form 2580). You must keep these applications at the CDRC; some sites have an automated version of the application that customers complete on the computer.

See the hard-copy sample of the DORS/PACS application on ***pages A-15*** through ***A-18*** in the ***Appendix***.

Customers must complete and sign the DORS/PACS application. To ensure the quality of applications, each one must be reviewed prior to entry into the system.

Transition Bulletin Board

The Transition Bulletin Board (TBB) is one of the career development tools offered through the CDRC. The TBB is a computerized listing of jobs, career workshops, job fairs, veterans services, military and civic associations, educational and training opportunities, support services, and information on franchises and starting a business. The TBB offers CDRC customers a quick and easy way to find the latest job openings and useful career development information.

Training

Training programs (or workshops) offered through the CDRC contain thorough instruction and offer excellent opportunities for hands-on training experience. These programs are discussed in the following paragraphs. You can review your needs assessment results to determine if there are additional workshops required by your customers. (For more information on needs assessments, refer to Section II, ***pages II-3 to II-23***.)

<u>Transition Assistance Program Workshop</u>

The Transition Assistance Program (TAP) is a 3- to 5-day program (workshop) providing career development information (e.g., skills assessment, resume writing, and interviewing techniques). Although this workshop is offered specifically to separating service members, their spouses are strongly encouraged to attend/participate. The workshop is sponsored by the Department of Labor (DOL) in conjunction with the DOD and the VA. Although the focus of the workshop is mainly on the job search process, there is also a wide range of topics relevant to transition (e.g., dealing with stress, relocation issues, veterans benefits).

See the TAP workshop agenda on ***pages A-19*** and ***A-20*** in the ***Appendix***. This was taken from the actual table of contents for the TAP workshop supported by DOL/DOD/VA.

By the time a separating service member is requesting career development assistance, he/she has already completed some initial steps in the transition process: he/she has had a preseparation counseling interview and completed a Preseparation Counseling Checklist. Although these customers are free to choose from any of the items on the checklist, attending the TAP workshop is mandatory unless it is **specifically declined** on the member's Preseparation Counseling Checklist (DD Form 2648). The TAP workshop is available to **all** separatees.

TAP workshop participants begin adjusting to the civilian lifestyle immediately, so many locations require participants to wear civilian clothes to the workshop. This tactic is helpful for making the adjustment, physically and mentally, to the appearance of a civilian citizen and of a civilian employee.

Attending the TAP workshop is the best starting point for all service members going through the transition of leaving the Navy. Spouses of separating service members are encouraged to attend the TAP workshop, because they are also going through the transition.

<u>Transition Assistance Program (TAP) Workshop</u> (Continued)

There are many training programs offered through the CDRC in addition to the TAP workshop. Some examples of these are:

- Job search strategies
- Resume writing
- Interviewing techniques

These training programs are excellent followup workshops to TAP, providing greater detail in these training areas. Separating service members are not required to attend these followup workshops, but they may decide they want more information or more practice in one particular area.

Verification of Military Experience and Training (DD Form 2586)

The Verification of Military Experience and Training (VMET) Document (DD Form 2586) is one of the tools used by **separating service members** who are seeking career development assistance. The VMET is a form that is generated automatically 180 days prior to the separation date. Separating service members should receive their VMET forms no later than 120 days prior to separation.

The VMET form verifies job skills, experience, and training the separating service member has practiced or acquired while on active duty. The main purpose of this form is to determine how to apply these qualifications to employment/education in the civilian sector.

The VMET includes civilian equivalent job titles and college credit information. For separating service members, these VMET items can be extremely helpful for establishing capabilities with prospective employers and for applying to college or vocational institutions.

Many separating service members also find the VMET to be an excellent source for preparing a resume. Make sure you remind them, however, that the VMET is a tool designed to help them but that it is not to be used as an actual resume.

CDRC staff must be prepared to review the contents of the VMET form to help with writing resumes, finding appropriate job leads, and dealing with other issues regarding employment.

Verification of Military Experience and Training (DD Form 2586) (Continued)

See the VMET form on ***page A-21*** in the ***Appendix***.

NOTE: If service members do not receive their VMET forms and they are within 120 days of separation, they can fax or mail their request to:

Fax: (703) 693-6471
DSN: 223-6471
Mail: Bureau of Naval Personnel
Transition, Relocation, and Deployment Support Branch (Pers-662)
Attn: Skills Verification Document
Washington, DC 20370-6620

PRESEPARATION COUNSELING

As the title implies, this customer service **applies only to CDRC customers who are separating** from the Navy. "Preseparation" is the time when the separating service member prepares himself/herself and his/her family members for life outside the military. During this period, the separating service member **must** receive preseparation counseling. Preseparation counseling is simply informing separating service members of the services and benefits available to them.

It is recommended that preparation begin at least 1 year prior to separation. The purpose of starting this transition process so far in advance is to be prepared when that separation date actually arrives; it helps to reduce or even eliminate the tension often associated with separation.

See the Transition Countdown shown on ***page A-22*** in the ***Appendix***.

PRESEPARATION COUNSELING (Continued)

No matter when the transition process actually begins, preseparation counseling is an essential element for two reasons. First, the separating service member must deal with logistical aspects such as benefits, housing, employment. Secondly, separating from the Navy is a major life change for any service member, regardless of the duration of his/her service; going through this transition process can be very difficult. Figuring out the logistics of separation and ensuring the emotional stability of the separating service member and family members are two major goals of the CDRC. Preseparation counseling helps the CDRC achieve these goals.

This part of the desk guide explains how to implement preseparation counseling — how separating service members find out about the transition services and benefits that are available to them. The items addressed under this topic include:

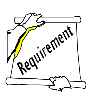
- The Preseparation Counseling Interview
- Areas of Preseparation Counseling
- Transition Benefits

The Preseparation Counseling Interview

Separating service members are informed about services and benefits available to them at a designated interview. For enlisted members, this interview is usually held with the Command Career Counselor (CCC); officers meet with the command, department head, executive officer (XO), or commanding officer (CO).

The CCC is primarily responsible for conducting the preseparation counseling interview and ensuring that the Preseparation Counseling Checklist (DD Form 2648) is signed by the member. However, under extreme circumstances, CDRC staff may be required to conduct the interview and secure the signature.

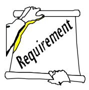
Spouses are strong encouraged to attend the preseparation counseling interview.



OPNAVINST 1900.2 states that this appointment must be conducted for all separating service members between 90 and 180 days before separation and not later than 15 days after official notification of separation.

The Preseparation Counseling Interview (Continued)

As program manager, you are **not** responsible for conducting preseparation counseling interviews. However, you **are** responsible for ensuring that these interviews are conducted.



In fact, one of the FSC accreditation standards is to "ensure that all transitioning personnel and their family members have access to . . . preseparation counseling." A key indicator of meeting this standard is that preseparation counseling interviews are conducted for 100 percent of the separating personnel. It is important, therefore, that you meet with and/or talk frequently with the CCC and his/her superior within the command.

The preseparation counseling appointment is conducted in order to do the following:

- Ensure all members are informed of the permanent transition services available to them.

- Ensure all members determine the preseparation counseling that they desire and are referred to the appropriate place for counseling.

- Ensure that an Individual Career Life Plan is developed for each member (and spouse, if requested) to help in identifying their educational, training, and employment objectives.

- Inform separating service members of the transition benefits to which they are entitled and the proper procedures to apply for those benefits (with special attention on benefits that require administrative action prior to separation).

To ensure that the separating service member understands the available transition services (and benefits), he/she must complete a Preseparation Counseling Checklist (DD Form 2648).[2]

[2] Family members do not complete this form, unless they are also separating service members.

The Preseparation Counseling Interview (Continued)

The Preseparation Counseling Checklist is the instrument that drives the preseparation counseling appointment. It is a listing of all the transition services and benefits that are available:

- Individual Career Life Plan[3]
- Effects of a career change
- Employment assistance
- Relocation assistance
- Education/training
- Health and life insurance
- Finances
- Reserve affiliation/priority
- Disabled veterans

The first five items on the list show transition services. The remaining four items indicate transition benefits. On the checklist, these major areas are broken down further into more specific types of assistance that are available. If a service member is interested in receiving assistance in any of the areas listed, he/she places a checkmark next to the item.

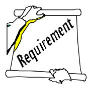
Another important aspect of the checklist is the inclusion of a Privacy Act Statement (on the back of the form). Service members are asked to read this statement before actually completing the checklist (i.e., checking off items). The Privacy Act Statement explains the purpose of the checklist — to record preseparation services and benefits requested by and provided to the service member and to identify preseparation counseling areas of interest.

The Privacy Act Statement notes that there are no other "routine uses" for the checklist. It also states that disclosure of any information on the checklist is voluntary, and that the member's Social Security number is used strictly to ensure proper identification of the individual and appropriate records.

The Preseparation Counseling Checklist and the Privacy Act Statement are shown on ***pages A-23*** and ***A-24*** in the ***Appendix***.

[3] On the Preseparation Counseling checklist (DD Form 2648), the ICLP is referred to as the Individual Transition Plan (ITP).

The Preseparation Counseling Interview (Continued)



Completion of the Preseparation Counseling Checklist is specifically mandated by Congress and DOD Directive 1332.36. The checklist **must** be signed (by the service member and the CCC or command) no later than 90 days prior to separation and filed in the member's service record. Preseparation counseling should not be administered without this completed checklist.

This checklist can successfully launch the separating service members into the transition process; it provides them with a starting point.

Areas of Preseparation Counseling

We have just discussed the preseparation counseling interview (the meeting at which the service member is informed of preseparation counseling) and the Preseparation Counseling Checklist (the means by which the service member is informed of preseparation counseling). Now let's go over the areas of preseparation counseling in greater depth (what the transition services and benefits actually are). The following areas of preseparation counseling are the transition services and benefits listed on the Preseparation Counseling Checklist.

Individual Career Life Plan

One area of preseparation counseling is the individual career life plan (ICLP). An ICLP is a written plan for the service member (spouse) that is designed to meet his/her particular goals for professional (and personal) development.

The ICLP outlines the individual's specific plans to achieve educational, training, and employment objectives. For the separating service member, developing an ICLP is a good method of systematically planning for training and experience in order to develop specific skills and knowledge. The ICLP provides the opportunity to meet the specific goals of an individual's transition.

Because separating from the Navy is truly a major life change, transition can be a relatively involved process. It is crucial that separating service members think about what they want to do and where they want to be in the civilian world. They need to structure their transition process based on their needs and interests. In order for them to do so, developing an ICLP is strongly encouraged. It is always easier to take action when you have a plan that guides you; the ICLP guides service members (and spouses) in their journey through transition.

Individual Career Life Plan (Continued)

The ICLP is a living document that can be altered or changed at anytime. The prime purpose of the ICLP is to help the user (i.e., the person developing the ICLP) set reasonable goals, assess particular strengths, and chart where to best concentrate and grow. Every ICLP is unique and provides each user the opportunity to design his/her future.

See the ICLP shown on ***pages A-25*** through ***A-30*** in the ***Appendix***.

As mentioned above, the ICLP is used to plan training and related developmental experiences. Many think of training only in terms of formal training courses. However, people learn in many different ways, and often people learn better if their training includes a variety of learning experiences. The ICLP can include a combination of the following types of training:

- On-the-Job-Training (OJT):
    - Seeking new duties on the job to promote new learning (e.g., a service member asks to be assigned to a special project even though its not a part of the regular job).
    - Initiating ideas or functions.
    - Cross training (learning about or training in more than one area).
    - Job shadowing ("following around" an experienced staff member).
- Academic training:
    - Colleges/universities.
    - Office of Personnel Management (OPM)/Bureau of Naval Personnel (BUPERS) training department.
    - Correspondence courses.
    - Short-term classes.

Individual Career Life Plan (Continued)

- Self-deployment self-learning (especially helpful with a mentor):

  - Readings.
  - Audio/visual tapes.
  - Lectures.
  - Speaking engagements/toastmasters.
  - Volunteer experience.
  - Conferences/meetings.
  - Physical fitness.
  - Membership in a professional association in a particular career field (see the Encyclopedia of Associations at the local library).

The ICLP is a helpful tool for the separating service member (or spouse) to plan the activities in his/her individual transition. It also helps CDRC staff to see that the member (or spouse) is provided with the appropriate counseling and assistance. You should promote the following outcomes and benefits of using the ICLP to your customers:

- Taking control of your life by being proactive.
- Breaking paradigms.
- Identifying opportunities for personal and professional growth.
- Gaining a sense of direction.
- Focusing on career objective(s) — identifying steps toward achieving objective(s).
- Developing timelines — both short term and long term.

Effects of a Career Change

Another area of preseparation counseling is the effects of a career change. Depending on what works best at your location, you may cover such topics during one-on-one counseling sessions or in one or more workshops. In either case, the topics to address in this area include:

- **Adjusting to the new identity**. Some people find their new identities easily; others tend to despair and worry that they may never find their new identities. Separating service members are encouraged to look at all of the possibilities that exist and to approach this adjustment as an opportunity to grow. Doing so is a significant step toward re-establishing an identity.

Effects of a Career Change (Continued)

- **Managing stress**. Stress is a physical response — a natural state of being. When someone loses a job, by choice or not, his/her life changes in many ways. The military to civilian career change, therefore, can be one of the most stressful events in one's life. The CDRC offers suggestions for dealing with the symptoms associated with stress.

- **Grieving and transition**. The stages that people go through in major life changes are often referred to as the "grieving process." These stages are denial, anger, depression, acceptance, and resolution. The CDRC can assist separating service members in proceeding through each of these stages successfully. The CDRC helps separating service members recognize these stages and acknowledge the movement from one to the next. This is what makes a healthy, successful transition.

NOTE: "Employment Assistance" and "Relocation Assistance" are the next areas of preseparation counseling listed on the Preseparation Counseling Checklist. (Both of these areas are covered under "Employment Assistance — Career Development" on ***pages III-6*** through ***III-16*** in this section of the desk guide).

Education/Training

Training programs offered through the CDRC are discussed in greater depth under "Training" on ***pages III-14*** and ***III-15*** in this section of the desk guide.

For specific information on education benefits and services available, refer to the Preseparation Guide or visit your local Navy campus office.

Health and Life Insurance

For specific information in this area, refer customers to the local health benefits advisor.

Medical Coverage

There are certain eligibility requirements for medical benefits through the VA. The VA's medical care system is set up to provide quality medical care to those who need it most and can afford it least. Only the least fortunate veterans may receive unlimited medical care at no cost. Therefore, most veterans will find their VA medical benefits are limited. "Typical" veterans shouldn't rely on the VA for all of their medical services. For any questions or issues concerning medical coverage, it is important to help veterans check with the VA.

Dental Coverage

Dental coverage operates differently than medical coverage. Early in the transition process, separating service members should see that they get a routine dental check-up. If there are any problems, the work involved can hopefully be completed prior to separation at little or no cost. Emergencies are also covered until separation.

The VA provides one-time dental care if it is applied for within 90 days after separation. However, this service is not provided if the military provided a dental examination/treatment within 90 days prior to separation. Beyond this, the separated service member must obtain his/her own dental insurance (through a new employer or private insurer). Again, the VA can provide more information regarding dental coverage.

Finances

The next area of preseparation counseling is finances. Unless a separating service member is positive that he/she has a job lined up, it is fairly safe to assume that he/she will be living on a reduced income. (On the average, separatees may be unemployed for 6 to 12 months.) Careful financial planning is the key to budgeting a limited income.

CDRC staff members must counsel customers on financial and budgeting issues or refer them to other FSC contacts (e.g., the Personal Financial Management (PFM) Program). As a program manager, you must also be aware of workshops that are offered on such topics as financial planning, family budgets and spending plans, record keeping, insurance, credit debt liquidation, consumer rights, taxes, and investments.

Reserve Affiliation/Priority

Reserve affiliation is another area of preseparation counseling. When service members enter military service, they incur a Military Service Obligation of 8 years. If separation occurs prior to fulfilling 3 years of active service, then some of that obligation remains despite returning to civilian life. Separating service members must satisfy that obligation by becoming a member of the Ready Reserve. This may be done in one of several ways; the Ready Reserve options include:

- **Selected Reserve**. Separating service members may voluntarily affiliate with the Selected Reserve (SELRES), either with a National Guard or Reserve unit.

  For the Selected Reserve, separating service members may sign an agreement to serve for 1 to 8 years in a National Guard or Reserve unit. These members may be recalled to active duty in time of war or national emergency. These members may also be ordered to active duty involuntarily for 90 days without a declaration of a national emergency.

  Selected Reserve members participate and train as required by the category in which they belong. For National Guard and Reserve unit programs, this usually means participating 1 weekend every month and training for 2 weeks per year.

- **Individual Ready Reserve**. If the service member does not affiliate with the above program, he/she will be assigned to the Individual Ready Reserve (IRR). The IRR consists mainly of individuals who have had training and have served previously in the active component. Other members of the IRR come from the Selected Reserve and have some of their Military Service Obligation remaining. As a member of the IRR, the separated service member may be involuntarily recalled upon declaration of a national emergency. Otherwise, there are no other participation requirements.

Disabled Veterans

Disabled veterans should be informed about the Vocational Rehabilitation Program. This program is limited to service members who are separating or retiring for medical reasons. Customers interested in vocational rehabilitation are directed to the VA rather than receiving assistance at the CDRC.

Disabled Veterans (Continued)

Separating service members can begin work in the Vocational Rehabilitation Program while on active duty. The separating service member's first step is learning about this program by attending a Disabled Transition Assistance Program (DTAP) workshop. The DTAP workshop — usually held during the last day of a TAP workshop — provides the following information on the Vocational Rehabilitation Program:

- **Training**. The VA will pay for tuition, books, fees, and supplies related to an apprenticeship program, on-the-job training, or a college degree.

- **Stipend**. While in training, the separating service member will receive a monthly check in addition to disability compensation for a service-connected disability.

- **Medical care**. The separating service member will receive medical care for any condition that interferes with the training program.

- **Job services**. Upon completion of training, the separating service member will receive job services to assist him/her in getting and keeping a good job.

Transition Benefits

As mentioned previously, the CDRC does **not** implement transition benefits. Instead, the CDRC provides separating service members with **information (or referrals)** on transition benefits. Based on accurate information about these benefits, separating service members may then be referred to the appropriate person or place. It is important that the CDRC's connection to transition benefits is understood as **I & R only**. This way, customers will not expect something that they cannot get, and you can point them in the right direction.

Transition benefits are temporary in nature and limited to four well-defined groups of personnel:

- Involuntarily Separated (IVS)
- Involuntarily Retired (IVR)
- Special Separation Benefit (SSB)
- Voluntary Separation Incentive (VSI)

Transition Benefits (Continued)

Eligibility for transition benefits depends on the nature and characterization of a member's discharge; eligibility for these benefits ends on 30 September 1999. IVS members may prove their eligibility for transition benefits with one of the following documents:

- Before separation:

  - Separation orders from BUPERS including 1) a statement that the member is eligible for transition benefits, and 2) the appropriate Separation Program Designator (SPD) code,

    OR

  - A letter from the CO stating that the member will be separated with a specific SPD code and is thus eligible for transition benefits.

- After separation:

  - Certificate of Release or Discharge from Active Duty (DD Form 214) with the appropriate SPD and re-enlistment codes or a Transition Assistance (TA) identification (ID) card.

It is important to identify IVS, IVR, SSB, and VSI members as early as possible because certain benefits require administrative action prior to separation.

Transition benefits are specific entitlements such as:

- Excess leave (up to 30 days).
- PTAD (permissive temporary additional duty).
- Priority affiliation in SELRES.
- Travel, shipment, and storage of household goods (HHG).
- DOD Dependent Schools (DODDS) enrollment.
- Montgomery GI Bill (MGIB) enrollment.
- Extended medical care.
- Extended commissary/exchange privileges.
- Extended military housing.
- Employment preference in Non-Appropriated Fund Instrumentalities (NAFI).

Transition Benefits (Continued)

The information listed below is a breakdown of the benefits offered. You need to be prepared to share this information with CDRC customers. This will help those who are eligible determine the appropriate course of action.

Benefits that **require action prior to separation** include:

- **Extension in Military Family Housing**. Space permitting, members and their family members may remain in military family housing for a period not to exceed 180 days after separation. A rental fee equivalent to Basic Allowance for Quarters (BAQ) for the former permanent pay grade plus Variable Housing Allowance (VHA) will be charged, except when reduced or waived by the installation commander in cases of hardship. To request this benefit, the member must write a letter to the Housing Authority (usually to the CO of the activity) stating: 1) the member is separating (either IVS, IVR, SSB, VSI) and is entitled to transition benefits; 2) the member's desire to remain in military housing; and 3) the length of time the member desires to remain in housing after separation.

- **PTAD/Excess Leave**. Members may receive **either** PTAD for a period not to exceed 20 days (30 days OCONUS) **or** excess leave for a period not to exceed 30 days to facilitate the member's relocation activities (such as job search and residence search). PTAD/excess leave is to be provided unless doing so would interfere with significant military missions. The member who takes excess leave **must** understand that he/she **will have to pay for the excess leave** at separation (retirement) and the dollar amount at issue. To request PTAD, the member must submit a Special Request/Authorization (NAVPERS 1336/3) for temporary additional duty. To request excess leave, the member must submit a NAVCOMPT 3065, Leave Request/Authorization, with the words "excess leave" written in the remarks section.

- **Air Transportation**. Members within 180 days of separation are eligible for air transportation on a space-available basis for the purpose of attending a DOD-approved transition program seminar. To be eligible, a member must be traveling on PTAD orders. A member may be accompanied by his/her spouse between CONUS and overseas locations and within and between overseas locations. However, family member space-available travel within CONUS to attend such a seminar is prohibited.

Transition Benefits (Continued)

- **Storage of Household Goods (HHG)**. Members may receive nontemporary storage of baggage and HHG for a period not longer than 1 year. To request this benefit, the member should notify the personal property office that he/she is a separating member and provide evidence of eligibility. All other forms and processing procedures are the same as for voluntary separatees.

- **Home-of-Selection**. Members are authorized travel and transportation of HHG to their home-of-selection (vice home-of-record). To request this benefit, members should notify the Personnel Support Detachment (PERSUPPDET) or Navy Passenger Transportation Office (NAVPTO) of their status and provide evidence of eligibility. All other procedures are the same as for voluntary separation.

Benefits for which **action prior to separation may be desirable** include:

- **Reserve Affiliation**. A member or prospective member (IVS, IVR, SSB, VSI) who applies to become a member of a National Guard or Reserve unit within 1 year after separation shall be given preference over other equally qualified applicants for existing or projected vacancies within the unit to which the member applies. To request this benefit, the member must contact a local National Guard or Reserve recruiter and provide evidence of eligibility.

- **Department of Defense Dependents School (DODDS) Enrollment**. Members who have family members enrolled in a school of the Defense dependents' education system, or a school for which tuition is provided by DOD, may continue the enrollment of that family member in the same manner as if the member were still on active duty, provided the family member has completed the 11th grade on or before the date of the member's separation and is likely to complete secondary education within the 1-year period beginning on that date. To receive this benefit, members must present the following items to the local DODDS registrar:

  - TA ID card or a letter from the CO stating that the member will be, or has been, separated (either IVS, IVR, SSB, or VSI) between 1 October 1990 and 30 September 1999.

  - Evidence that the family member completed 11th grade on or before the member's date of separation (i.e., the family member's final grade report for the junior year).

Transition Benefits (Continued)

- Evidence that the family member was authorized space-required or space-available, tuition-free status during the junior year (i.e., the orders used by the member to enroll his/her family member in the junior year).

- **Commissary/Exchange**. Members and their family members have commissary and exchange privileges for a period of 2 years after separation. To use this benefit, the member and family members must have TA ID cards.

Benefits that **require action upon separation** include:

- **Medical and Dental Care**. Medical and dental care will be provided for members and their family members in certain DOD medical facilities in the same priority as family members of active duty personnel. Medical and dental care will be provided for a period of 60 days after separation if the member was on active duty for fewer than 6 years, or 120 days if the member was on active duty for 6 years or more.

  NOTE: This dental care includes a check-up; extensive dental care and/or surgery is not covered.

- **Pre-existing Condition Coverage**. During or within 30 calendar days subsequent to the above period of DOD-sponsored medical/dental care coverage, a member may purchase the DOD-sanctioned conversion health insurance policy, Uniformed Services Voluntary Insurance Plan (U.S. VIP). For members who separate on or after 2 October 1991 **and** purchase U.S. VIP, DOD will cover the expense of a medical claim that is denied on the grounds that a condition (including pregnancy) was pre-existing. Coverage by DOD of pre-existing conditions is authorized only as long as the member maintains enrollment in U.S. VIP, with enrollment limited to a maximum of 1 year.

  Pre-existing Conditions Defined. Pre-existing conditions are defined as injuries and sicknesses that made themselves known or were medically treated within 1 year of the effective date of the pre-existing condition coverage. Only those expenses not paid under the terms of the U.S. VIP policy solely on the grounds that the medical conditions are pre-existing will be covered. The only exception is for pre-existing conditions involving pregnancy. Medical expenses for pregnancy related conditions will be paid even though they are not covered conditions under U.S. VIP.

  NOTE: To use this benefit, the member and family members must have TA ID cards and must enroll in U.S. VIP.

Transition Benefits (Continued)

Effective Date Defined. The effective date of pre-existing condition coverage will begin at 12:01 a.m. local time where the claimant lived on the day his/her U.S. VIP policy became effective. Costs incurred prior to the effective date of the claimant's U.S. VIP policy are not covered.

Eligible Family Members Defined. Family members eligible for pre-existing condition coverage are those defined under Title 10, U.S. Code, Section 1072, and include spouses, children under age 21 (under age 23, if full-time students), and qualifying parents and parents-in-law living with the separatee. Children include adopted children and court-appointed wards.

- **Hiring by NAFI**. Members separated **on or after 5 November 1990** and their family members shall be provided a **one-time** preference in hiring by Non-Appropriated Fund Instrumentalities (NAFI). NAFI are operations that pay for themselves (e.g., Navy exchange, and other food operations). Any profit that is earned by NAFI is returned to the command in services.

  A member or family member may apply for a NAFI position before or after retirement. A person eligible for preference shall be referred for selection only if he/she is among the best qualified candidates after a competitive screening process is completed. Hiring preferential is terminated upon placement in, or declination of (whichever occurs first) a NAFI position for which application is made. To receive this benefit, members and family members must show proof of status (IVS, IVR, SSB, VSI) at the time of application (i.e., selected early retirement notification letter, separation orders, or letter from the commanding officer).

Transition Benefits — Special Cases

Members separated with an honorable discharge **on or after 3 February 1991** will receive an opportunity to enroll in the MGIB or convert from the VEAP to the MGIB. Members desiring to enroll **must do so before separation** and must make a $1,200 lump-sum payment at the time of enrollment.

Family members acquired by birth, marriage, or adoption prior to expiration of the member's eligibility period are eligible for transition benefits (e.g., medical care and commissary privileges), regardless of whether they become a family member before or after the member's active-duty separation date. Family members acquired after the member's active-duty separation date are entitled to benefits only as long as the sponsoring, separated member is within the eligibility period for transition benefits.

<u>Transition Benefits — Special Cases</u> (Continued)

Certain transition benefits may not be available to members and family members residing overseas due to the status of forces agreements (SOFAs) and/or military base treaties between the United States and certain foreign countries. TAP counselors and program managers should advise separating service members of any restrictions on the availability of transition benefits.

As you can see, preseparation counseling is a major part of transition assistance. You must be prepared to provide your customers with accurate information on all of the transition services and benefits available to them. Preseparation counseling is often a lead-in to other customer services offered through the CDRC.

AVAILABLE RESOURCES

In Section II of this desk guide, we discussed how to plan for the CDRC. We asserted that program planning involves the identification of available resources. Identifying resources for the CDRC is important because you will probably realize — if you are not already aware — that you are dealing with limited resources (e.g., downsizing, “doing more with less”).

In this part of the desk guide, we provide you with a brief review of this topic but ask you to go a step farther. Now that you have a thorough understanding of the customer services you must implement, you need to organize the resources that you have already identified. In other words, organizing the resources that you have identified will allow you to optimally implement customer services.

Since some of the CDRC’s customer services are mandated by public law, you don’t always have a choice about **which** services to provide. However, identifying and organizing your available resources helps you determine **how** you can provide customer services.

For customer services, we have broken down resources into four basic categories:

- People resources
- Community resources
- Fiscal resources
- Physical/material resources

If you are lacking in any one of these resource areas, it may affect your ability to effectively provide services to your customers. It is your responsibility as program manager to allot the appropriate resources for each area.

People Resources

It is important that you have an idea about who can help you provide customer services. Your most immediate people resources are those considered as CDRC staff. In addition to the CDRC staff, think about others within the FSC that can help you implement customer services. Also consider individuals on or off the base that could be of assistance to you. There are also groups and organizations outside the FSC that can be very helpful; we will discuss such groups under "Community Resources."

Your first step in organizing people resources is to compile a list of the individuals that can benefit your customers. When compiling this list, think about the knowledge, skills, abilities, and preferences of each person. Your list may include the following people:

- FSC staff
- Volunteers:
  - Retirees, spouses, single sailors, teenagers
  - Customers who are receiving, or have received, your customer services
  - Employees for after-hours assistance
- Military:
  - Temporary duty
  - Limited duty
  - Reservists
- VA work-study

Once you have compiled your list, consider how to organize your people resources. Think about the people from the list who need to work together to accomplish certain tasks. Different tasks should have different working groups. Meet with each of these groups to discuss what needs to happen to accomplish the task. At each group meeting, you might discuss how to:

- Handle the volume of customers coming in to use customer services.
- Confront specific problem areas.
- Get work done as a team.
- Assign specific activities to different individuals .
- Pool resources with others (inside and outside the FSC).

Community Resources

Community resources usually consist of groups or organizations (as opposed to individuals), on or off the base, that can contribute to providing customer services. To organize your community resources, start by answering the following questions:

- What military and/or civilian groups/organizations could benefit your customers?
- What specifically do these groups/organizations do?
- Who is the contact person for the group/organization?
- What role do you play in the relationship with this community resource?
- If you are duplicating services, can you pool your resources and work together?
- Would this resource serve you best as a referral?
- Can this resource help you market the CDRC?
- Can you or your customers quickly get information from this resource?

Organizing People and Community Resources

Plan to personally visit as many of the previously listed people and community resources as you can. Organize all the names you've gathered in a rolodex or a computerized list. You'll want to network with some of these people, sending them press releases and/or offering them briefings about the CDRC and customer services. You may want to post information at the previously mentioned organizations as well.

You can organize other names by the skill or service offered. For example, you could have rolodex cards, file folders, or computerized records with headings like "Counseling Services," "Educational Opportunities," "Employment Assistance," or "Relocation Information."

Fiscal Resources

Organizing fiscal resources will depend somewhat on the role you play in determining the budget for the CDRC; budgetary responsibilities vary among program managers. Regardless of your budgetary responsibilities, however, you must at least understand the budget process. (A detailed description of this process is provided in Section IV of this desk guide.) This knowledge will help you organize the fiscal resources for customer services.

Fiscal Resources (Continued)

The first question you should ask is whether there is any money in the CDRC's (or the FSC's) budget for customer services. If so, how much? Since money is almost always tight, make a list of everything you absolutely need. It's also a good idea to make a second list of the things you would "like to have" (i.e., a wish list). With the CDRC's needs and wants defined, you're one step closer to organizing fiscal resources. When money does become available, your lists will help you determine how it should be dispersed.

If you don't have the fiscal resources for the CDRC, determine who can help you obtain the things you need. Many groups and organizations will provide you with certain materials for free (e.g., maps of the area, educational materials, computer software). By determining who has the resources you are lacking, you may be able to borrow or share what you need (e.g., space, equipment).

Also remember that bartering is a legitimate way to get the resources you need. Consider your knowledge, skills, abilities, contacts, and/or resources that could be bartered to get the resources you need or want. For example, you may arrange to have some badly needed data processing completed for an FSC staff member, if he/she agrees to speak at your next workshop.

If the fiscal resources aren't available to you now, figure out a way you can justify them later. Remember, next to your FSC Director, your Major Claimant can be of great help in this area.

Physical/Material Resources

Physical/material resources play a major part in providing customer services. Consider the following physical/material resources:

- Space:
  - Is there enough work space for you and your staff to provide customer services?
    - Are there private spaces to do one-on-one counseling?
    - Are there training spaces for large and small groups?
  - Is there enough work space for the customers to make use of the services provided?
  - If space is inadequate, who has space available that you can use or share?

Physical/Material Resources (Continued)

- Equipment:

  - Is there enough furniture available for customers who are either waiting or working?

  - Are there enough available computers for customer demand?

  - Is there additional equipment (besides computers) that you need to professionalize and enhance your services (and products)?

  - Do you have enough (and/or appropriate) printed materials (e.g., books, magazines, newspapers, journals, and training materials) to benefit your customers (and staff)?

  - Do you work closely with the library (or other people) to obtain printed materials?

Once you have organized the resources you need to provide customer services — people, community, fiscal, and physical/material — you will be ready to take action.

QUALITY ASSURANCE AND EVALUATION OF CUSTOMER SERVICES

This part of the desk guide discusses how to ensure quality in customer services and how to evaluate their effectiveness.

Quality Assurance

Quality assurance is more than just evaluating how well you **have provided** customer services; it's striving for quality in every part of the process in providing customer services. As you're going through all of the steps to provide customers with these services, you should be asking yourself whether everything is being done correctly.

The following factors come into play when you're ensuring quality:

- Product standards
- Timeliness
- Cost in dollars and time

Quality Assurance (Continued)

Let's look at some examples of quality assurance. For your training workshops, do a regular update of the lesson plans. No matter who is teaching the workshop, make sure the information is as current and accurate as possible so that the participants will fully benefit from taking it. Include a workshop evaluation as a constant element at the end of the workshops you offer. An evaluation should be completed by the participants, the instructor, and any guest speakers.

See the sample Workshop Evaluation (for participants) on ***page A-31*** in the ***Appendix***.

Of course, quality is important not just for training, but for every customer service. Throughout this section, we have made references to the FSC accreditation standards. Every FSC staff member must be aware of these standards. You must be aware of what is expected of the CDRC when an official accreditation review team comes to visit the FSC.

For more information on FSC accreditation standards, see ***pages IV-33*** and ***IV-34*** in Section IV, Administration.

However, providing quality products and services doesn't just mean meeting the FSC accreditation standards. And it doesn't just mean a pat on the back at a performance review. Providing quality products and services means meeting the needs of CDRC customers on a daily basis.

Provide all customers visiting the CDRC with an evaluation form to get an idea about how your program is doing and how well you are providing customer services. You can learn a lot from such evaluations and by simply asking customers for their honest opinions and perceptions. Ask them for their opinions and perceptions while they're on base; your customers may answer more freely on their own turf.

Evaluating Effectiveness

Evaluating how effectively you are providing customer services is an ongoing process. Continuously check to see that you are meeting the program planning goals that you established for the CDRC's customer services.

Evaluating Effectiveness (Continued)

Listen to what your customers say about the CDRC and about customer services. In addition, consider the following questions:

- Are people taking advantage of these services?
- Are there things that you could do differently to increase usage?
- Are there products used with these services that can be improved upon?
- Are you lacking in followup efforts with customers using customer services?

Surveys are another good way to find out the answers to some of these questions. For more information on surveys, see ***pages II-11*** through ***II-14*** in Section II, Program Planning.

As in any other evaluation, you also need to check your efforts against what you have required of your staff. Ask the CDRC staff for feedback on how they think you are doing as a program manager, and how the CDRC is doing in providing customer services. There is a variety of ways to do this, from informal conversations to filling out internal evaluation forms (like those completed by customers).

Quality assurance and evaluation are integral parts of providing customer services.

SUMMARY

This section of the desk guide covered the implementation of customer services. This information was presented under the following major topics:

- Employment assistance — career development
- Preseparation counseling
- Available resources
- Quality assurance and evaluation of customer services

You should have a clear understanding of how customer services are provided to CDRC customers. The administrative duties (e.g., day-to-day tasks and routine paperwork) involved with these services are covered next in Section IV, Administration.

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

SECTION IV

ADMINISTRATION

January 1998

INTRODUCTION

This section of the desk guide explains administration for the Career Development and Resource Center (CDRC). Administration is an important function because it enables you to:

- Effectively run the CDRC.
- Provide customers with consistent quality service (and products).
- Save time.
- Provide documented details for customer followup.
- Produce local and national reports.
- Recognize trends.
- Evaluate products and services.
- Document CDRC successes and effectiveness.

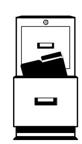
As the person responsible for the CDRC at your Family Service Center (FSC), you will be completing and/or overseeing administrative duties in many different areas. A lot of your administrative responsibilities will be determined by your FSC and type of base.

Every FSC is set up differently, depending on the physical setting, the local community, etc. Such variables determine exactly how administrative duties are completed. Just keep in mind that what works best at one base may not work at all at another. You are responsible for determining how to implement administration for the CDRC at your base.

This section explains what needs to happen or what you need to do in order to complete administrative tasks for the CDRC; presents some common examples of effective administration; and gives you some tips on how to ensure quality and evaluate the effectiveness of your administration.

The following areas of administration are covered in this section:

- Standard Operating Procedures (SOPs)
- Computers
- Customer files
- Resource files
- Scheduling and time management
- Meetings
- Reporting
- Budgeting
- Contracting



STANDARD OPERATING PROCEDURES (SOPs)

The first area of administration is Standard Operating Procedures (SOPs). One of the best ways to define how to complete a task is to develop an SOP. An SOP is simply a set of written instructions, in outline form, on how to execute or complete a certain task. An SOP can be developed for any task that you feel is appropriate (e.g., setting up/conducting workshops, conducting intake appointments, and creating/organizing resource files).

When developing SOPs, make sure that you take into account any factors that may affect how the task is carried out. There may be situation-related and location-related issues that you need to consider for your particular base. Also make sure that you are following any and all required guidelines. SOPs allow CDRC staff to better understand all the factors involved with completing tasks and how these factors may affect their day-to-day operations.

Some bases are very strict about the SOP format; others are not as formal. (Check with your FSC Director for the appropriate format.) The most important aspect of SOPs is not the format but that the people responsible for carrying out a certain task understand how to do it. SOPs are especially useful for standardizing a way of doing things — making sure people are doing things the same way. The SOP can be a great tool for the administration of the CDRC.

To look at one format, see the Sample SOP on ***page A-33*** in the ***Appendix***.

COMPUTERS

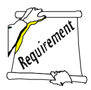
The second administrative area is understanding your computer-related responsibilities. For the CDRC, there are two basic aspects of computer administration:

- Customer computer use
- Staff computer use

Customer Computer Use

For CDRC customers, automated computer systems are an integral part of career development assistance.

Customer Computer Use (Continued)



According to the FSC accreditation standards, you must ensure that automated information systems sponsored by the Department of Defense (DOD) are in place, on-site at the FSC, and that they are being used to their full potential to assist customers. These automated information systems include the Defense Outplacement Referral System/Public and Community Service (DORS/PACS) and the Transition Bulletin Board (TBB).

In addition to these automated information systems, several other software packages are usually available for use by CDRC customers. It is your job to research what computer software is available (e.g., by reading, by going to computer conferences) and to decide which packages you want to use for the CDRC. Some software packages include:

- SF 171 (standard Federal employment application form).
- America's Job Bank (contains job listings).
- Myers-Briggs Personality Indicator (indicates personal behavior tendencies).
- Strong Interest Inventory (elicits personal interests).
- Discover (also elicits personal interests for career and educational information).
- Word processing software (e.g., WordPerfect, Microsoft Word).
- Resume help (resume design is usually done with word processing software).
- Federal job listing (displays job opportunities in Federal sector).
- State job listing (displays job opportunities in the State).

Staff Computer Use

For CDRC staff, using computers efficiently can be like having another competent staff member. In the long run, computers can save you a lot of time and make the CDRC look very professional. You and your staff can use computers for a variety of reasons, such as:

- Organizing and compiling customer information.
- Inputting training data (on attendance, evaluations, etc.).
- Corresponding (with other CDRC people, customers, potential employers, etc.).
- Developing workshop materials.
- Developing marketing materials.
- Creating briefings (with graphics).
- Collecting data and analyzing trends.
- Generating program/marketing plans.

Staff Computer Use (Continued)

While the use of computers may require a good deal of time for learning, programming, and inputting, it will prove to be very beneficial in the administration of the CDRC.

To help you meet the needs of both your customers and your staff, you must comply with the administrative responsibilities related to using the computers efficiently. These responsibilities include:

- Helping to obtain/maintain computers
- Learning the logistics
- Accessing available training
- Using computers for reporting
- Meeting customer demand

Helping To Obtain/Maintain Computers

Your first administrative responsibility in this area is helping to obtain and maintain the computers. BUPERS Transition has provided computer hardware and software to the CDRC.

You may wish to purchase additional software, computer upgrades, or even new computers. Usually, the first step is to check with your FSC Director on the availability of government funds for computers/computer equipment. If no local funds are available, you can use an Unfunded Request. This document is submitted to BUPERS Transition.

See the Sample Unfunded Request on ***page A-50*** in ***Appendix***.

There are a few key people at the FSC involved in computer administration and maintenance. First, there is the person responsible for property accountability — furniture, computers, and other equipment. This person keeps track of and updates information such as serial numbers for central processing units (CPUs), monitors, and printers. There may also be a computer specialist who has specific responsibilities such as ensuring there is a virus check on each computer, servicing computers, obtaining software, and keeping disks and documentation in a safe place.

Helping To Obtain/Maintain Computers (Continued)

Another key player in the administration of computers is your BUPERS Transition-funded Automated Data Processing (ADP) specialist. The main function of the ADP specialist is usually data entry (e.g., input into the QOLMISNET[4] system). However, there may be other data processing or administrative responsibilities that are part of the ADP specialist position.

Computer Rules, Guidelines, Limitations

In general, you need to consider the following:

- Sign-in
- Time limits
- Eating/drinking
- Floppy disks/virus scan

It is important that you develop some guidelines for tracking computer use to determine whether or not you are meeting customer demand. One way of tracking computer use is using a sign-up sheet at the entrance or next to the computer(s). Every time a customer comes in to use a computer, he/she records the time of day, how long he/she plans to be on the computer, and the reason for using it.

Ask customers to sign in and to adhere to any designated time limits. If you are in a large and/or busy FSC, the customer demand for computer use is usually high. In these cases, you should limit computer usage to a couple of hours per customer, per computer.

Remember never to eat or drink around the computers and prohibit others from doing so. You may want to post signs around the computers that read “No Eating or Drinking.” Spilled food or beverages can damage or ruin computers.

Also, decide how you want to handle the use of floppy disks on customer computers. Some FSCs do not allow customers to bring in their own floppy disks; instead, they provide each customer with his/her own disk when needed. Other centers allow customers to bring in their own disks. For example, a customer may have his/her resume on disk and may want to add a few finishing touches and print it out. In cases like this, you must ensure that a virus scan is run on all disks brought into the center.

[4] The Quality of Life Management Information System Network (QOLMISNET) is a computer program established by Pers-66, a division of the Bureau of Naval Personnel (BUPERS). The QOLMISNET system was designed in order to collect FSC program data to help ensure quality of life for Navy members and their families.

Computer Rules, Guidelines, Limitations (Continued)

Although foreign disks (with viruses) are more likely to enter the FSC with customers, disks used by CDRC staff are not immune to viruses. In this day and age of swapping information via technology (e.g., disks, modems, and the Internet), you must ensure that a virus scan is installed on all of the computers used for the CDRC.

Your computer specialist should be able to tell you about the virus scanning software that's being used and whether (or how often) it's being updated. If one isn't already in place, try to get an automatic virus scan that works every time a new disk is put into the computer or a file is downloaded. This kind of virus scan, with regular software updates, is especially critical if you use the Internet as a resource or if disks are being used that have come from outside the FSC. Also remember that if the computers in your FSC are networked, a virus on one computer means a virus throughout the FSC (i.e., every computer), which may have potentially disastrous consequences.

Accessing Available Training

Your third administrative responsibility related to computers is taking advantage of available training. With computer technology changing so rapidly, ongoing formal and informal training has become a necessity. At a minimum, you (and your staff) must know how to utilize the word processing package used at your FSC. You must also be able to operate in the QOLMISNET system in order to meet reporting requirements. CDRC staff should also be able to use and help their customers use TBB and DORS/PACS. If you or your staff are not familiar with these and other software packages, you should learn how to use them so that you can better assist your customers.

Someone always needs to be onhand to answer any questions customers may have regarding the software they are using. This can be your computer specialist, a receptionist sitting near the computers, or any staff member familiar with the software.

Many FSCs offer training classes in word processing and similar computer classes. Both staff and customers can attend such classes. If you don't have such training resources available at the FSC, check on bringing someone in from the community (e.g., a family member, friend, neighbor, or volunteer from a local organization) who can teach a particular software package. Also look for classes that are held on base or in the community and see if you and/or your customers can attend.

Using Computers for Reporting

The fourth administrative responsibility related to computers is knowing the procedures for inputting data that is used for reporting purposes.

FSC staff members use the computers to meet specific reporting requirements. CDRC staff do this by collecting information and entering the data on the QOLMISNET computer system. Since the computers in your FSC will probably be up and running, the QOLMISNET system should already be loaded onto all the computers as well.

The QOLMISNET system is used to compile information for reports that are requested by the Bureau of Naval Personnel (BUPERS). The QOLMISNET system was designed to help you organize customer data and recognize important statistics or trends. The QOLMISNET system was also designed to make it easier for people to send and receive pertinent information.

Most of the information required for QOLMISNET is data you collect from your customers anyway. The data are usually recorded on some sort of a customer information form for new customers. The recorded data can be input directly from this form into the computer. Sometimes the ADP specialist completes this task, so that CDRC staff members aren't spending time doing data entry. Specific contents of QOLMISNET reports are discussed later in this section. (See the information under "Quarterly Report.")

Meeting Customer Demand

The fifth responsibility related to the administration of computers is meeting customer demand. Other FSC staff members may use computers only to help them organize information and/or meet reporting requirements. However, CDRC staff are responsible for providing their customers with computer use and computer assistance. Meeting the customer demand for computers is a responsibility that is not necessarily required throughout the FSC.

If you find that the availability of computers is not meeting the demand of CDRC customers, it is up to you to do something about it. Your tracking and reporting information can be very helpful to you when you are assessing customer demand. There may be ways you can reorganize your resources to obtain new computers and increase the amount of time that computers are available for customer use.

For example, if you are making a case to the FSC Director or your Major Claimant that there is a need for new computers, data from your reports will support your claim. You may also be able to use your reporting data to explain to your staff that customers aren't getting enough time on the computers. By working together, you and your staff might be able to adjust your schedules to increase the amount of time that computers are available for customer use.

Meeting Customer Demand (Continued)

The tracking/reporting of computer information should also help you identify which computer software is being used and which is not. You may decide to get rid of one package and look into purchasing another. You may also determine that customers aren't using the computers for the reasons that you thought. For example, you might have assumed that resumes and letters (usually done using a word processing package) were high priorities for computer use, but you find that the computers are mostly being used for the automated systems (e.g., DORS/PACS, TBB).

CUSTOMER FILES

A customer file can be any one or any combination of the following:

- Customer information form
- Customer file on the computer
- Customer file folder

We will explain each of these customer file versions below.

Customer Information Form

This form can be completed by the customer individually, or you may ask the customer for the information and record the answers yourself. This form serves two major purposes:

- You get to know your customer
- You obtain customer information necessary for QOLMISNET reports

BUPERS and the CDRC require the statistical data contained in the Sample Customer Information Form on *page A-35* in the *Appendix*.

There may already be a customer information form that is used for the CDRC, or you may want or need to develop a new one. What the customer information form looks like and the method in which it is stored is up to you (and your staff members).

Customer Information Form (Continued)

For example, the CDRC staff members at one FSC use large index cards as their information forms; these are stored in what look like recipe boxes that sit on their desks. At another FSC, the customer information forms are generated on standard 8½ x 11 paper; once complete, these forms are filed by month in a central filing cabinet.

In both of these cases, the customer information form is considered the customer file.

Customer File on the Computer

Regardless of the size of the form or how it is stored, most people find that the best and easiest way to develop a customer information form is to use the information that is required for QOLMISNET reports as a guide. Whatever variation of the form you choose to use, the data from the completed form must be entered into the QOLMISNET system, anyway. Worry less about the format of the form, and more about the content; asking for the same data that are required in your QOLMISNET reports will save you some time and effort. (The Sample Customer Information Form in the appendix is based on QOLMISNET reporting requirements.)

When the data from the customer information form are entered into the QOLMISNET system, a file is created on the computer. (This data entry is sometimes done by an ADP specialist.) The file that is created is considered the customer file.

Customer File Folder

Customer files may also contain information on your customers that is not required for reporting purposes. You may want to record the history of and recommendations for each customer to help you keep up with individual customer needs. Other information that customer files may contain include:

- Relevant documentation:
  - Resumes
  - Correspondence
- Important notes:
  - Significant points or observations you've made during customer meetings.
  - Actions that have been agreed upon (by you and the customer).
  - Reminders about future meetings or followup efforts.

Customer File Folder (Continued)

The original customer information form and such additional information is usually stored in a file folder. This folder (including its contents) is considered the customer file.

As you can see, the customer information form is basically the origin for all three types of customer files. Whichever type works best for you, make sure that it is standardized for your staff and that there is an organized system for filing/storing hard-copy customer files. Also ensure that the appropriate information is entered into the QOLMISNET system.

Confidentiality

As you already know, confidentiality is an important aspect of customer files. This is usually a major customer concern and an issue that all FSC staff members must take very seriously in all areas.

When filling out a customer information form, customers must read and sign a Privacy Act Statement. (Customers may also have this statement read to them.) The Privacy Act Statement should cover the following issues:

- The FSC’s legal authority for requesting customer information.
- The principal purpose for collecting customer information.
- Other routine uses of customer information.
- Circumstances in which disclosure of customer information is permitted.

The Privacy Act Statement and your professional behavior should demonstrate to your customers that confidentiality is a high priority in every aspect of the entire FSC. Show your customers that you understand the importance of keeping their lives private. Both the FSC and all of its customers benefit from strict enforcement of confidentiality.

In the ***Appendix***, see ***page A-24*** for the Privacy Act Statement. Also see ***page A-36*** for Items on Confidentiality Conduct.

RESOURCE FILES

The fourth administrative area deals with resource files. In Section III of this desk guide, Customer Services, we discussed how to obtain and organize resource files for purposes of helping your customers. When conducting customer services, there may be times that you feel you are not the appropriate person (or group of people) to answer a customer's question, to provide a customer with specific information, or to help a customer with a particular problem. In such cases, you must be able to direct your customer to the appropriate resource(s).

Such resources are used for information, education, and referral for your customers. Examples of these resource files are the information and referral (I & R) materials used by all FSC staff, kept in an FSC customer resource library, or contained in your CDRC customer resource library.

In this section, however, the idea of "resource files" takes on a different meaning. Here, we will discuss files that are initially a resource to **you**, rather than your customers. These are files that you collect and organize to help **you** do your job better. These resources may contain information that you can then pass on or make available to CDRC customers.

Such resource files usually include the following:

- Books (on career development and related topic areas)
- Reference books
- Magazines, periodicals, journals
- Newspapers
- Job listings
- Job fairs listings
- Maps
- Videos
- Audio cassettes

In this area of administration, we will discuss the following topics:

- Sources of resources
- Maintaining resource files
- General CDRC resources
- Employment resources

Sources of Resources

There are several sources of resources that can provide you with a great deal of helpful information:

- Internet
- Community
- Library

One source comes through gaining access to the Internet and spending a few hours browsing. A second source comes through checking out what's available in your community. A third source comes through doing some research at the local library; research librarians can be extremely helpful.

The ultimate reason for setting up such resource files is to have important information at your fingertips. In addition to on-base resources, there are other individuals and organizations that can be invaluable to you and your customers. For example, chambers of commerce can provide you with local employment information. As a program manager, you are responsible for knowing what resources are available to you and how you can get your hands on them.

Maintaining Resource Files

Keeping files on all your resources — those that come to you like second nature and especially those that do not — can be very beneficial for you and your customers. Organized and current resource files can help you provide customers with the appropriate information and/or contacts they need to answer their questions or resolve their problems in a timely manner.

The first step you should take is to set up an efficient system for locating the appropriate resources. You can do this in any manner that works best for you. The following are some ideas for organized resource files:

- Lists you have saved as files on the computer.
- Hard copies of lists (inventories) you keep filed at your desk/workspace.
- Rolodex or index cards set up by name, organization, or topic.

Whichever method(s) you choose, try to organize your resources to meet the needs of those in the CDRC and of other FSC staff as well. Every FSC staff member does I & R. It is important, therefore, that you have a thorough knowledge not only about your subject-matter resources, but also about other valuable resources in the FSC. Resource files enable you and also others, if you are out of the office, to find information quickly.

General CDRC Resources

Now that you have a few ideas on maintaining resource files, let's discuss what goes into them. Your resource files may often be listings or quick references that are easily accessible to you and other staff members. The items below are some examples of the types of resources you should keep on file:

- All of the customer services available to customers.
- Educational sources in the area.
- Sources of financial assistance in the area.
- Licensing and certification resources.
- Tips on dealing with stress.
- Tips on budgeting.
- Job search and career resources for veterans.
- Information/tips on the job search process.
- Major employers in the area (broken down by number of employees).
- Staffing agencies and temporary services in the area (with **no fee**).
- Defense contractors in the area.
- Foreign companies in the area.
- If outside the continental United States (OCONUS), American companies in the area. and the American Embassy.
- On-base employment opportunities.
- Information and tips on Federal employment.

Although resource files are most helpful to you to organize your information, they can be made into lists/quick references that are extremely helpful to your customers as well. Customers don't always need to use the computers, and they don't always need to research entire books. Post resource lists/quick references on the walls or distribute them as colorful one-page fliers.

See the Sample Resource List on ***page A-37*** in the ***Appendix***.

Employment Resources

As you may have noticed, most of the resources listed above relate to employment. While the CDRC is responsible for helping customers in other areas (e.g., education, relocation, stress management, and budgeting), employment assistance is the most predominant service available to and used by CDRC customers.

Employment Resources (Continued)

In addition to any resource lists/references you have posted and/or distributed, make sure customers know about other places where they can look for work. Although they aren't "resource files," the items below are additional employment resources of which customers should be aware:

- **Classified Ads**. These ads are usually highly competitive and not as productive as other job leads. If not for actual job possibilities, however, customers can use them to pick up key words and phrases to use on resumes and during interviews. If you can, or when it is necessary, obtain the classified ads for papers in other areas.

- **Yellow Pages**. Looking through the Yellow Pages helps customers determine the potential community employers in their specific career fields. These are the businesses that customers can target when planning "cold calls," resumes/cover letters, and networking efforts.

- **Job Service or Employment Commission**. The state employment commission has job listings of many job vacancies in the local and surrounding areas. Customers can refer to these listings to determine which occupational titles they are interested in. State employment commissions should also know when Federal employment registers are open for applications. A veterans representative is available to assist all veterans with the job search process.

- **Community College Career Centers**. These centers are free to the community. They have detailed listings of job categories by name and of products needed by local business and industry. Information on special job placement training programs is also available. Career counselors may be able to advise customers as well.

- **Chambers of Commerce**. You or your customers can ask for a business directory from the local chamber of commerce. The directory contains addresses and phone numbers of businesses and industrial firms licensed to operate within the area.

- **Trade Publications**. The information in these publications can be of special value to customers with skilled trades or customers interested in being professional practitioners. These publications show growth, changes, and opportunities as well as "big names" in the business community.

Employment Resources (Continued)

- **Bulletin Boards and Newsletters**. The CDRC or the FSC should already have both of these. Make sure that these include current employment announcements (e.g., "Hot Job Leads") and that they are updated regularly.

- **Base Human Resource Office (HRO)**. The HRO is a ready source of jobs in the local military community. Job boards are located in each HRO. There are also non-appropriated fund employment opportunities listed. These jobs do not require a civil service rating and are sometimes a good source of immediate employment (e.g., Navy exchange and other food operations).

- **Formal Networking**. Urge customers to look into professional networks, occupational networks, and special interest networks. These are the best and most effective ways to zero in on potential employers and jobs in specific career fields.

- **Informal Networking**. Tell customers to let everyone know they are looking for a job. This informal networking can result in leads and phone calls that give them referrals inside organizations. Remind customers that 80 percent of all jobs are never advertised.

SCHEDULING AND TIME MANAGEMENT

The fifth area of administration is scheduling and time management. An FSC is a very complex environment. You may find in your position as program manager that time becomes a precious resource to be managed carefully. With the advent of the information age, technology has increased our daily pace. People are forced to produce ever more quickly, to keep up with the speed at which machines process information.

In addition, you will be going to meetings; answering to supervising staff and BUPERS; developing and/or presenting training programs; seeing customers; answering phone calls; corresponding with various people; and running projects. Many people will be counting on you, and you want them to consistently receive the best service from you. Also, other staff must be aware of where you are and how they can get ahold of you.

Most people agree that a lack of control over their workday adds to their stress level. It is no surprise then that the administrative matters relating to scheduling will greatly depend upon your time management skills. Sometimes the FSC will have its own method of scheduling. If you are new to the FSC and the way things are run, ask other FSC staff how they set their schedules.

SCHEDULING AND TIME MANAGEMENT (Continued)

You may have scheduling methods you rely on as well (e.g., pocket calendar, tickler files). Setting your own schedule plus meeting the customer demand for services can be very difficult. In any case, you must juggle your own schedule as well as that of the CDRC. Whatever method(s) you choose, you are responsible for seeing that things run smoothly in the CDRC and for scheduled events within the FSC.

This part of the desk guide looks at all the things you will have to schedule as a program manager and how you can manage you time to accomplish them. Time management gives you some control over your work and helps to eliminate stress. There's no one "right way" to manage your time. This desk guide will give you some ideas that you can tailor to your own particular working style.

What You Have To Schedule

First, let's look at **what** you have to schedule:

- Customer services
- Meetings
- Professional development
- Collateral duties

Each of these items will be described separately. Then we'll discuss to how to schedule and manage your time.

<u>Customer Services</u>

A major goal of the CDRC is to meet customer demand. Therefore, setting aside time in your schedule to implement customer services is obviously of major importance. Whether you need to facilitate a workshop or conduct a meeting with a customer, you must either make yourself available or see to it that one of your staff members is available.

Let's first take a look at scheduling the workshops offered through the CDRC. Many program managers schedule all of the workshops for the coming year, line up any guest speakers, and arrange for one of the staff members to conduct or facilitate each workshop. Depending on your FSC, your role in this area may be more or less significant. In any event, orchestrating CDRC workshops can take up a large amount of your time.

Now consider the time that you have available for one-on-one customer sessions. At some bases, CDRC staff can immediately spend time with walk-in customers. At other bases, there is not enough time for the number of customers coming in, so customers must schedule their appointments in advance.

Customer Services (Continued)

For example, as many as 100 people may walk through the door of an FSC at a large base in 1 day. In cases like this, customer meetings may have to be scheduled in advance; and sometimes each meeting must be limited to only 30-minutes. FSCs at smaller bases usually see many fewer customers. CDRC staff members at these bases can usually see customers on a walk-in basis.

The number of customers coming in, therefore, will be a significant determinant of the time you can spend dealing directly with customers. Keeping track of the number of workshop attendees and the number of walk-in customers will help you determine whether scheduling efforts are satisfactory for your customers or if scheduling adjustments need to be made.

Meetings

Another one of your administrative duties is to schedule and attend meetings. You will need to schedule, set up, lead, or attend a variety of meetings. Some of these will be held for the DOD, some will be Navy-wide, some will be internal, and some will involve the local community.

As program manager in charge of transition, it is important that you establish a transition committee to coordinate all appropriate on-base service providers through periodic (at least quarterly) meetings. These meetings are held to assess needs; to plan, implement, review, and improve processes and procedures; and to evaluate transition effectiveness.

Open communication helps any organization. Meeting regularly with all CDRC staff is a way of ensuring the lines of communication are kept open. You and your staff can discuss what's going on, what's coming up, what's been accomplished at the CDRC, and other matters of importance to the CDRC. Although there are usually many interruptions, hold frequent staff meetings where everyone has equal input. In addition to these staff meetings, make feedback and/or guidance part of your daily routine with your staff.

You must also have time in your schedule to meet with commands. It is imperative that you keep the commands informed about the CDRC. FSC command representatives are responsible for communicating issues relating to the whole FSC. As program manager, however, you must do your part to communicate with the commands on CDRC issues.

Scheduling time to meet with community groups and organizations is also important in order to learn about and discuss ways you can share information and/or work together. There will always be people outside the Navy who deal with aspects of career development. Sharing information and services with such people can be beneficial to all those involved.

Professional Development

Take advantage of any training classes offered to FSC staff or program managers. Training can benefit your own personal development and can also enhance your supervisory skills for the benefit of the CDRC. Training may be offered in areas such as:

- Computer literacy (general)
- Word processing (and other specific software packages)
- Total Quality Leadership (TQL)
- Supervisory/management skills

Whatever your needs or wants regarding professional development, schedule some of your time to take advantage of the training offered.

In addition to what is listed above, regularly read current articles, journals, books, etc., which will enhance your general knowledge.

Collateral Duties

In addition to those duties that are required for the CDRC, most FSC program managers are responsible for other collateral duties. For example, you may sit on a committee or board as part of a command (e.g, Quality of Life Committee). Serving in another role can be a positive thing. You may learn things that can improve your performance as a program manager. You can bring information from serving in other roles back to the CDRC. You can also use committee/board meetings as a forum to promote the CDRC.

Another collateral duty may be serving in the FSC's Command Representative Program, which was mentioned previously. Although your role here is to represent the entire FSC, you can make such contacts with the command work to the CDRC's benefit.

How To Manage Your Time

As you can see, your position as a program manager demands that you find the time to complete many different kinds of tasks. That demand forces you to learn how to manage your time effectively. A few of the techniques for effective time management include:

- Prioritizing
- Clustering tasks
- Controlling procrastination
- Using other timesavers

Each one of these techniques will be explained separately.

Prioritizing

The concept behind prioritizing is to order your tasks in such a way that the most important ones are completed first. This helps you avoid spending a lot of time on less important matters. One way to prioritize the work you need to complete is to use the "ABC" method. In the ABC method, each task is assigned the letter A, B, or C, depending upon its importance.

- "A" tasks are tasks that **must** be done quickly. If these tasks are left undone for very long, horrible consequences will result.

- "B" tasks are less important than A tasks. They should be done soon, but they can be postponed for a little while.

- "C" tasks can be put off indefinitely without dire consequences. These tasks may rise in priority to a B or an A as time goes by and the deadline comes closer.

You may also want to add a category for "D" level tasks. These are tasks that would be nice to accomplish, but nothing negative will happen if you don't.

Once you've assigned each task a letter, schedule them in your calendar or organizer according to priority. In other words, schedule the completion of the As first, followed by the Bs, etc. Some people prefer to use post-it notes or index cards rather than organizers. In that case, write one task, along with its assigned letter, on each note or card and order them by priority.

You'll also want to set up a tray file system on your desk, with one tray for each task level. Review the items in the A and B trays daily, to be sure you're completing the priority tasks. C and D trays need to be reviewed only once a week.

Clustering Tasks

The second technique for managing time effectively is clustering tasks. Clustering tasks means to assemble like tasks together and to do them all at one time. Outgoing phone calls can be clustered like that. For example, at the end of each day, you could make a list of all your phone messages and other calls you need to make. Then take a block of time to make those calls all at once. This is an efficient use of time for two reasons:

- You're not interrupting other tasks to make phone calls throughout the day.

- You're more likely to reach people at the end of the day, when they're not besieged by other calls.

Controlling Procrastination

The third technique for managing time is controlling procrastination. Putting things off until the last minute is a dangerous habit, and yet it's something that all of us do at one time or another. People tend to procrastinate for a lot of reasons, but two of the most common ones are:

- The task seems unpleasant.
- The task appears to be overwhelming.

The table below provides some solutions to these two problems:

PROBLEM	SOLUTIONS
The task seems unpleasant	Complete the task first thing in the morning. Put a reminder about the task where you can't miss it (e.g, your computer screen or the seat of your chair). Ask for help. Someone else might actually enjoy doing this task.
The task appears to be overwhelming	Divide the task into smaller, more manageable pieces. Find a quiet, solitary place to work on it. Start it, work as long as you can, and take breaks when you need to.

Using Other Timesavers

In addition to prioritizing, clustering, and controlling procrastination, there are many other techniques you can use to manage your time effectively. Some ideas include:

- Use a tickler file to remind you (or “tickle” you) about tasks to be completed. A separate file represents each day for the next 30 days, then each of the following 11 months have their own folders too. File each item you have to work on into the file with the appropriate date, based on the item’s deadline. Then, every morning, review the contents of the folder for that day.

- To limit your time on the phone, make notes about what you want to discuss before you return a call.

- To minimize phone tag, make definite appointments to call people.

- Set a general time limit on how long your return calls will be. Use an hourglass or egg timer to let you know how long you’ve been on the phone. Cut the call short after the allotted time, if possible.

- Throw away any unread “junk” mail.

- Cancel subscriptions to publications that you rarely have time to read.

- Skim publications for relevant articles. If you don’t have time to read them when you spot them, tear the article out and file it for future reference.

- Throw away magazines and newsletters that are more than 1 month old. You probably won’t have time to read them anyway.

- When reading a report, read the Executive Summary, if there is one. Otherwise, skim the opening and closing paragraphs, and read the lead sentences and key words in the other paragraphs.

Tailoring Time Management to You

As was mentioned earlier, there’s no one “right” way to manage your time. How you schedule your work depends a lot on when and how you prefer to work. For example, are you a morning person? Do you feel sluggish or energized in the afternoons? Do you prefer to work steadily all day, or in short, intense bursts?

The table on the next page gives some suggestions on what to schedule, depending upon how active and alert you’re feeling during the day.

Tailoring Time Management to You (Continued)

For times when you feel . . .	Schedule . . .
Alert	Important reading. Meetings with the command or with superiors. Trouble shooting or problem solving. Boring tasks.
Sluggish	Tasks of short duration. A variety of different tasks. Something that requires physical movement (e.g., delivering a file to someone in another building). Something you're really interested in.

The way you schedule your work will also be determined by **how** you prefer to work. For instance, you may be a linear worker, who wants to complete one task before starting another. Linear workers are task-oriented and prefer clearly defined procedures and precise schedules. Or you may be the type of worker who prefers to juggle several projects at once, in a looser, less defined way.

Keep in mind that these work preferences can be extended beyond individuals to countries as well. This has implications for those at OCONUS sites. For example, the United States and Germany are usually considered to be linear countries. Generally, the workday starts relatively early and ends early, with clearly defined tasks accomplished within precise schedules. Italy, Greece, and the Middle East do not follow that convention. The business in those countries is conducted in a looser, more flexible way. The workday starts later and ends later, and socializing is encouraged. At an OCONUS site, when you're working with representatives from the host country, it's important to be aware of and understand these kinds of distinctions.

MEETINGS

Your sixth administrative task is to set up, lead, or attend meetings. As noted in "Scheduling and Time Management" above, meetings are very important. Meetings are a good way to get a lot of people together face-to-face to give or get information, to sell an idea, and/or to come to joint decisions. The interaction from meetings can provide immediate feedback, an exchange of information, and the forum for building consensus. However, in order to do these things, meetings must be run effectively.

The most successful meetings are those that are run smoothly, have a clearly stated purpose and agenda, aren't held too frequently, and involve prepared and active participants. There are three basic characteristics of smooth, effective meetings:

- Logistics (or preparation) — Giving the participants advance notice; reserving a suitable meeting space at a good time and place; and getting equipment/supplies in advance.

- Group process (or how participants behave) — Practicing behaviors or actions such as setting ground rules, keeping communication channels open, using active listening, and reconciling disagreements.

- Task items (or what participants are working on) — Agreeing on and sticking to the agenda; agreeing on the purpose of the activities; stating the actions or decisions needed; separating opinions from facts; and staying focused on one topic at a time.

Whether you are the meeting facilitator or an attendee, you should assist in these three areas, as appropriate, and pay attention to how the meeting is conducted.

Planning a Meeting

If you are planning the meeting, ask yourself the following questions:

- Why are you having the meeting? Consider the following:

  - Purpose of the meeting.
  - Outcome/objectives.
  - What success will look like at the end of the meeting (a clear picture).
  - What type of meeting it will be? Information sharing, problem solving, or decision making?

Planning a Meeting (Continued)

- Who should attend the meeting? Some possibilities include:

  - FSC staff
  - CDRC staff
  - Resource people
  - Visitors

- Do you have an agenda?

  - How long is the meeting?
  - Is the agenda developed ahead of time?
  - Is prework needed?
  - Is time provided for an evaluation at the end of meeting?

- In addition to the attendees, what roles are needed to conduct the meeting successfully? Some possibilities are:

  - Facilitator
  - Minute taker/recorder

- What kind of meeting environment will you have? Think about the following:

  - Meeting place and room arrangement.
  - Places to hang charts or display graphics.
  - The need for minutes/information from a previous meeting.
  - Materials/supplies that are needed.

- What followup will take place after the meeting?

  - Do you need to plan for the next meeting?
  - How will decisions or assignments that were made be followed up?
  - Who will distribute the minutes?

Developing an Agenda

As noted previously, one of the most important steps in meeting preparation is developing an agenda. Developing an agenda is not only helpful for you to plan the meeting, but it can also help to prepare and even motivate your participants.

If at all possible, the best time to develop or start developing an agenda is at the end of a previous meeting. However, if you are organizing a first or one-time meeting, make sure you give yourself enough time to come up with an agenda (or at least an outline) beforehand. The five important steps in developing an agenda are discussed next.

The first step in developing an agenda is identifying the agenda items you want or need to cover. The items will depend on what you have determined to be the meeting's purpose. The second step is determining the objectives for each item. The objective might be a decision, an action item, or a determination of what additional information is needed to make a decision. Objectives are like goals — they give participants a sense of accomplishment upon completion.

The third step is estimating the time needed for each agenda item. If it seems that you have only a few big items, try to break them up into several issues, and discuss each issue one at a time. Some meeting leaders share time estimates with the attendees; others like to use time estimates to keep themselves on track and the meeting on schedule. It's up to you to determine what will work best in your situation.

Showing meeting attendees your time estimates can have positive or negative effects. Some feel that conflict is created if attendees disagree with the importance (or nonimportance) of certain items, based on the varying amounts of time allotted for each item. Some also believe that sharing time estimates gives attendees an opportunity to leave or not participate. However, others like to share time estimates in order to:

- Indicate to the attendees the relative importance of each item.
- Help attendees tailor their participation to the time available.
- Convey a sense of meeting progress to attendees.

The fourth step in developing an agenda is determining what people, tools, and/or materials are needed. You may have different people responsible for the presentation/discussion of different agenda items. You (or the other presenters) may also need certain materials or tools to encourage participation and keep attendees on track.

The fifth step — which will more than likely be determined along the way — is sequencing the agenda items. Consider the agenda items you have identified, and then prioritize them. One suggestion is to begin the meeting with something that can be easily dealt with; this starts you off on a note of accomplishment, confidence, and energy.

Developing an Agenda (Continued)

One final suggestion is to use an agenda worksheet before you develop the final agenda. You can use an agenda worksheet to make sure that you accomplished the above steps and that you didn't forget anything. If your agenda worksheet includes the necessary components, in the correct order, you are ready to do your final agenda.

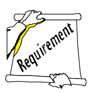
See the Sample Agenda Worksheet on ***page A-38*** in the ***Appendix***.

REPORTING

The seventh administrative duty covered in this section is reporting. Every program manager reports to a superior (or superiors) — usually the person responsible for all FSC programs. People in this role supervise your work, provide vision, establish connections with others, present the CDRC and your ideas to others, and are often ultimately responsible for the CDRC's successes and failures.

As a program manager, one of your administrative responsibilities is to communicate to your superiors how the CDRC is doing. In addition to day-to-day interaction, you can communicate with your superiors by reporting. Reporting is a more formal approach. Reporting gives you a chance to present the CDRC (and your contributions) to others, especially senior management. With thorough and accurate reporting, you should be able to justify the needs of the CDRC (e.g., filling a new position, getting more resources).

However, reporting isn't just the administrative responsibility of communicating with your superiors.



Reporting is a mandated requirement referenced in two Naval instructions — Secretary of the Navy Instruction (SECNAVINST) 5214.2 and (Chief) Naval Operations Instruction (OPNAVINST) 1900.2. In fact, one of the FSC accreditation standards is that the ". . . reports document required statistics and are submitted by

In the information that follows, we discuss how QOLMISNET is used to meet these requirements and what reports are specifically required.

As a program manager, you are generally responsible for:

- Quarterly reports
- Other required reports (for base, command, Major Claimant)

REPORTING (Continued)

There are specific criteria for summarizing various pieces of information that you have collected about the CDRC in these reports.

As we mentioned in the information on customer files (above), most people develop a customer information form to collect the required data for QOLMISNET reports. Once obtained, the data from the customer information forms are input into the QOLMISNET system. QOLMISNET is a fairly user-friendly system that allows you to input not only this required reporting information, but additional (optional) information as well.

The information input into the QOLMISNET system is summarized and submitted accordingly, based on the requirements of a particular report.

Quarterly Report

The quarterly report is required by the Office of the Secretary of Defense (OSD). This report includes information on CDRC customers; the number of workshops being held and the number of people attending them); and various seminars, outreach, job fairs, etc. The Command Career Counselors (CCCs) play a critical role in this data collection process by determining the total number of preseparation counseling sessions. It is important to partner with the CCCs.

The program manager compiles the data for the report. The program manager is also required to include success stories. These success stories are from CDRC customers who have positive comments on the help they received from the CDRC — to adjust, to go back to school, to find a new job, etc. (TAP evaluations are not considered success stories.) BUPERS uses these success stories to sell the merits of the program, to respond to White House and Congressional taskings, and to justify program existence.

See ***pages A-39*** and ***A-40*** in the ***Appendix*** for Sample Success Stories.

See ***pages A-41*** through ***A-48*** in the ***Appendix*** for Quarterly Report reporting requirements. (Notice that this report was originally designed for TAMP.)

Other Required Reports

While BUPERS uses the information contained in the quarterly report to justify the program's existence, you may use the same information to comply with additional reporting requirements from your command. The quarterly report may be beneficial to the internal functioning of the CDRC. Such reporting requirements allow you the opportunity to report on the successes of the CDRC, track its progress in relation to FSC programs, and make location-specific suggestions or decisions about it.

BUDGETING

The eighth administrative area is budgeting. A budget is a plan that incorporates: 1) your current knowledge about the CDRC's financial resources, and 2) how you intend to spend money for the CDRC in the future.

Preparing and maintaining a detailed financial plan — the budget — is a major administrative responsibility. Different locations handle their budget requirements in different ways. **Regardless of where you fall in terms of administrative budget responsibilities, you must be aware of the budget process at the very least.**

The Budgeting Process

The table on the following page presents the three phases of the budgeting process and describes what occurs during each phase.

Also see the graphic representation of Budget Formulation on ***page A-49*** in the ***Appendix***.

The Budgeting Process (Continued)

Phase	Description
Formulation	This phase involves planning and developing the budget for the fiscal year, which will commence 1 year from each 1 October. The formulation phase begins when the Comptroller of the Navy issues a call for budget estimates to the Chief of Naval Operations (CNO), Command Master Chief (CMC), and CHNAVMAT, and Offices, Bureaus, Systems Commands, Fleet Commands, and other commands that report directly to the CNO. This call is based on guidance received from the Assistant Secretary of Defense (Comptroller) (ASD(C)) in late June. The formulation phase continues with review, modification, and approval of the estimates at all echelons of the Department of the Navy (DON) and with review, amendment, and final approval by the Secretary of Defense, the Office of Management and Budget (OMB), and the President.
Justification	This phase involves presenting and justifying to the Congress the budget for the fiscal year beginning on 1 October of each year.
Execution	This phase involves obligating and expending Congressionally appropriated funds for the current and prior fiscal years.

A month-by-month calendar of the budget process looks something like this:

Month	Activity
June/July	NAVCOMPT Budget Preparation/Submit Hearings
August	NAVCOMPT Budget "Mark-Up" ■ CNO Hearings ■ SECNAV Hearings ■ OSD Budget
September	OSD Budget Preparation/Submit NAVCOMPT Review of OSD Submit
October	OSD/OMB Hearings
November/ December	PBD/OSD Marks/Reclamas
January	President's Budget to Congress

The Budgeting Process (Continued)

Month	Activity
February/ March	Senate & House of Representatives Armed Services Committees Hearings
April/May	SASC/HASC Report House/Senate Authorization Bills Senate & House Appropriations Hearings
June/July (following year)	SAC/HAC Reports
August (following year)	Senate/House Appropriations Bills Conference on Appropriations
September (following year)	Appropriation Public Law

This budget process determines the formal appropriations for the CDRC.

When you do find that you need additional funding, however, you should use an Unfunded Request. An Unfunded Request is made to BUPERS through a Major Claimant with written justification for specific needs that were "unfunded" in the budget. Keep in mind that working through your Major Claimant is the proper course of action. Remember, your Major Claimant holds a lot of power in determining who gets what.

See the Sample Unfunded Request on ***page A-50*** in ***Appendix***. (Notice that this one was completed for RAP; the CDRC often coordinates with this FSC core program.)

Again, you may have little to do with the formal budget process; but it is still a good idea to talk to your Director and/or other FSC staff members to familiarize yourself with funding, tracking, reporting, and other budgetary issues.

CONTRACTING

The last area of administration we are covering is contracting. Contracting is a way of obtaining services that are otherwise not immediately available. Contracting usually involves the temporary or time-limited employment of a person or organization **to provide a service (or services)** to the FSC — ultimately to your customers.

Contracting is a way to get expert help for the CDRC. One example would be to contract with an instructor to develop materials and present a particular training program.

The area of contracting is usually linked to budgeting, since a key item in the budget is any contracting requirements. While you may or may not be involved in the contracting process, you should at least be aware of how it works.

Contracting has very definite rules. For example, let's say that you assist in writing a contract to have a certain service provided. The contractor who was awarded the contract may decide to hire someone to provide that service. Because you were involved in writing the contract, you are automatically disqualified from applying for or filling that position.

If you are involved in contracting, you may be responsible for administrative issues such as:

- Obtaining information on contractors.
- Establishing and maintaining administrative files on contractors.
- Tracking the accomplishments made by contractors (e.g., course evaluations).
- Tracking the payment of contractors.

The Contracting Process

Although staffing models are not always the same, the key person involved in the contracting process is the Contracting Officer Representative (COR). The documentation that is initially required is a Statement of Work (SOW). The SOW outlines the need for the particular service or position to be contracted (rather than filled internally). An example would be contracting an outside instructor with expertise in a particular subject to teach a course in that subject. The COR writes the SOW (or at least ensures that the SOW is written). The COR often obtains assistance in having the SOW written; this assistance can come from the alternate COR (ACOR) and/or from others offering technical advice.

For more information, see the Sample SOW on ***page A-51*** in the ***Appendix***.

The Contracting Process (Continued)

When the SOW is complete, it is sent to the base contracting office (i.e., the group of people responsible for all of the contracting for the base). The contracting office then approves the SOW and puts out (advertises) the Request for Proposal (RFP). Contractors then begin bidding on the contract by writing and sending in proposals.

NOTE: The size and location of a base often determines whether or not there is a contracting office. If the base doesn't have a contracting office, those involved in the contracting process must go to the nearest one at another base. For example, there isn't a contracting office at the Gaeta, Italy base, so contracting issues must go through the contracting office at the Naples, Italy base. At some CONUS bases, the contracting office is called the Fleet Industrial Supply Center (FISC).

A technical review team is involved in reviewing the proposals that are received. The COR may also be involved in this review. These team members base their review on a determined set of criteria. The team submits the results of this review to the contracting office; the team may propose a specific contractor. Then, those at the contracting office make the final decision on a contractor. They base their decision on the results of the review team and on any of their own criteria.

The Contracting Administrative Officer does any necessary negotiating with the contractor(s). Once the contractor begins providing service to the Navy, the COR evaluates the contractor's performance to ensure the requirements of the contract are being met.

FSC

Ask your FSC Director whether you have responsibilities in the contracting process at your FSC.

QUALITY ASSURANCE AND EVALUATION

As you learned in Section III, Customer Services, quality assurance means more than just evaluating how you did once a task is completed. Quality assurance means you take steps, throughout the process, to achieve higher quality.

As you're completing administrative tasks, ask yourself the following kinds of questions:

- Is there any way I can use the computer faster, more effectively? Do I need additional training to do this?

- Do my resource files cover the topics I need to know about? Can I find my resource and training files quickly?

QUALITY ASSURANCE AND EVALUATION (Continued)

- Am I managing my time appropriately? Can people reach me when they need to?

- Is there a process in place for checking that the data entered into QOLMISNET was entered accurately? Is there a way to make that process better?

In addition to the above questions, you should also consider how the following factors affect administration:

- Evaluations from customers on customer services.
- Evaluations and feedback from the command.
- Feedback to and from your staff.
- Periodic self-assessments on your performance.
- Performance reviews.
- Perceptions and opinions through informal conversations on base.
- Standards regarding training:
    - Required updates of lesson plans for all classes.
    - Following guidelines set for workshops.
    - Evaluations completed by the participants.
    - Evaluations completed by the guest speakers.
    - Self-evaluations for the instructor.

Another way to ensure quality in the CDRC is to follow established quality standards.

Quality Standards

As a program manager, there is always more to do than you have time for. Quality standards can help you focus on the core requirements for the CDRC so that you can better prioritize and complete your tasks. The quality of your work and of the CDRC are weighed against different standards.

Of these standards, the accreditation standards are the most common and probably the most important. The FSC accreditation standards were developed to ensure that customers would benefit from consistent quality services. Evaluation teams come to FSCs for scheduled accreditation reviews. These reviews are formal examinations to see that FSC programs are functioning in accordance with the accreditation standards.

Quality Standards (Continued)

In an accreditation review, the evaluation team checks to see that all accreditation standards are being met — those that apply to the FSC as a whole and those specific to individual FSC functions. The review team can determine if the standards are being met by looking for specific key indicators.

Ask your FSC Director for a listing of the accreditation standards and review those that apply to the CDRC. Accreditation standards can also be used as a benchmark against which to measure your performance.

SUMMARY

This section covered the following areas of administration:

- Standard Operating Procedures (SOPs)
- Computers
- Training files
- Resource files
- Scheduling and time management
- Meetings
- Reporting
- Budgeting
- Contracting

This section also explained how to handle the different types of administrative tasks related to these areas. Remember, the way in which you complete administrative tasks will vary, depending upon your FSC and the type of base. However, as a program manager, you are responsible for the effective implementation of administration for the CDRC at your base.

In the next section of the desk guide, we examine how to implement community interaction.

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

SECTION V

COMMUNITY INTERACTION

January 1998

INTRODUCTION

This section of the desk guide covers the function of community interaction. Community interaction is an important function for you as a program manager because it allows you to stretch your resources and extend your services, while still providing quality services to your customers.

Let's begin by defining what the phrase "community interaction" means. For our purposes, a "community" is a group of people who have something in common. Whether it's living in the same area, sharing interests, or developing policy, the people are linked or unified in some way. The second part of the phrase, "interaction," can be defined as communication involving reciprocal action or influence.

The "community" for the Career Development and Resource Center (CDRC) consists of many people that have something in common. You communicate and work with many of these people. In this case, community interaction means communicating and working with those who share common interests with the CDRC.

Community interaction is becoming an increasingly important aspect of the program manager position. After dealing with downsizing, base closures, and shrinking resources, most Family Service Centers (FSCs) are finding that they have to do more with less. As a result of these trends, you will be relying on your relationships with others more than ever.

Building and maintaining these relationships can be done in many ways. In this section, we focus on two basic areas of effective community interaction:

- Networking
- Collaboration

There usually aren't clear distinctions between those people who are in your network and those you turn to for collaboration. You will find that there is (and should be) a lot of overlap in these two areas. Nonetheless, the information on the following pages provides an overview of both, defining the terms, explaining what each entails, and describing your role in each area.

NETWORKING

Networking is a form of community interaction that is essential. Networking may begin as a simple conversation between two people, but it can grow into a way of building and maintaining relationships with many people. Networking is an intentional exchange of knowledge, skills, information, resources, and/or contacts that is of immediate or future benefit to all parties involved. Learning how to network is a necessity in an environment of constant change, where cooperation, coordination, and collaboration are needed to get the job done. As a networker, you must be prepared for a give-and-take relationship with others. Creating a strong network can be a huge asset to you and the CDRC.

Your network may include a variety of people such as:

- Employers.
- Contacts at local area organizations who can provide you with access to employers.
- Veterans Affairs personnel.
- Business professionals and community leaders.
- Chamber of commerce personnel.
- Contacts at organizations with information on the local environment.
- Other service providers.
- Navy League

Philosophies/Tips on Networking

Before you set out to build a network, make sure you understand the philosophies listed below. We've also included tips that are helpful for maintaining and/or enhancing your network.

- Networking is a learned skill. Some people are more comfortable with "meeting and greeting" than others, but everyone needs some practice.

- What goes around comes around. In other words, if you help someone, it is more than likely that they will return the favor. Remember, networking involves a lot of give and take.

- It has been said that you are within seven contacts of anyone that you want to talk to as long as you are very clear about what you want.

- You will continue to have an excellent network, both professionally and personally, if:

    - You thank people for their help.

    - You speak well of people in your network.

Philosophies/Tips on Networking (Continued)

- You are willing to "give" when asked to or at least refer the person to another resource.

- When something comes up that would benefit someone in your network, you proactively pass it on to him or her (as soon as you can).

- You look for opportunities to repay your fellow networkers.

- You are known for being both a "giving" and "asking" person.

■ Networking can be both informal (casual meetings or conversations) and formal (intentional or direct efforts).

■ Networking is helpful in all aspects of your life: Job, community, family/home, and personal.

■ There are several scenarios that can occur in networking: two people may benefit from networking at the same time; one person may benefit now, and the other later; or one person may never directly benefit from the initial contact, but will receive a payback from another party later on. The important thing is that both people are **active** networkers.

■ Networking is a barter system. Person 1 gives Person 2 a lead that results in a job offer; in exchange, Person 1 receives free financial advice. The important thing is that both people feel that the exchange is of equal value.

■ **Never make a judgement about whether a person can help you. Let the person make that decision after he or she has heard your request.**

Getting Your Network Started

There are a few simple things you can do to get your network started:

■ Make a list of **everyone** you know. Tell them personally, in writing, or on the phone how they can help you. Make sure that your request is clear, concise, and focused.

■ After you've done your research, make a list of everything or everyone you'd like to know and ask everyone in your network for help. Start with people that you know are closest to the source.

COLLABORATION

Collaboration is very similar to networking; you might say it's the next step. Collaboration is working jointly with other organizations, sharing resources and a common vision in pursuit of common goals. Specifically, the CDRC may collaborate with another organization by sharing information and ideas; sharing staff, spaces, facilities, and funds; co-sponsoring programs and services; cross-training all staff; and clearly eliminating competitive relationships. Both groups involved should gain something from the relationship.

Collaboration helps you to look more at the "big picture." For example, you look more at what the total needs of families in the community are rather than focusing on what services you alone can provide. Looking at the total needs of the families allows you to identify gaps in community services. Working collaboratively with other organizations can help to fill those gaps and extend services.

Professional organizations generally have one of the four following types of relationships with other organizations. Into which category does the CDRC fit?

- **Little or no coordination**. Groups tend to have competitive relationships. Territory and/or ownership issues are problematic. Groups may or may not be aware of each other and make little effort to seek working relationships.

- **Coordination**. Groups work separately but try not to schedule conflicting events. Competitive relationships may exist but generally are not destructive.

- **Cooperation**. Groups promote and participate in each other's services and programs, periodically make other needed resources available to each group, and maintain an effective network. Competitive relationships, if they exist, are disappearing.

- **Collaboration**. Groups share staff, information and ideas, spaces, facilities, funds; co-sponsor programs and services; cross-train staff; and are clearly eliminating competitive relationships.

In any collaborative process, networking is the interpersonal skill you must employ. Individual networking then creates a win-win situation for the organizations involved (i.e., collaboration). In addition, and more importantly, it benefits the customers.

COLLABORATION (Continued)

Here's an example of how a program manager was able to extend services by making use of a valuable collaborative relationship:

> A program manager wanted to do a workshop for spouses and separating service members on the job search process, featuring guest speakers. The program manager didn't have the space or the ability to handle all the logistical planning required, and decided to collaborate with the State Employment Commission (SEC). The SEC provided the space and the logistical planning. In turn, the program manager planned for the guest speakers, the workshop, and the marketing. It was a win-win situation: the workshop drew new people to the SEC, and the program manager was able to provide a needed service to customers.

Collaborating in the Community

There are a variety of groups outside the military with which you can collaborate as well. Although we can give you suggestions, you will know best what exists in your community and what avenues you can explore. The more research and investigating you do, the greater the chances of success for the organizations involved and the customers.

In the specific area of employment, you may collaborate with area business and professional associations, local labor departments, chambers of commerce, and corporate and Department of Defense (DOD) connections in the geographic area of interest. In the specific area of relocation, you may collaborate with financial experts, real estate companies, and moving companies, to name a few.

In broader terms, additional collaborative groups may include organizations in the community that provide the same service(s), community educational resources, and various support groups. Whether your interests and/or needs for collaboration are general like these or very specific like those mentioned above, do not pass over any opportunity to better serve your customers.

Factors Affecting Collaboration

In order to build successful collaborative relationships, you need to consider five factors that influence success:

- Climate
- Process
- People
- Policies
- Resources

Factors Affecting Collaboration (Continued)

Each of these factors is discussed briefly in the information that follows.

Climate

How favorable the community climate is to change will affect your collaborative efforts. The community climate can range from highly supportive of change to not supportive at all. Generally, the climate is most open to change when a problem is a top priority in the community, and the problem is perceived as having multiple causes (e.g., teen pregnancy).

However, even if the community doesn't really support change, either because problems aren't perceived, or the community is distracted by other issues, you can still begin to work collaboratively. Use this time for planning the collaboration and how it will work.

Process

The success of collaborative efforts is also affected by **how** the partners in collaboration work together. It's important to develop a strong vision, establish common goals, and agree on the role each partner will play. In addition, collaborative partners must build a strong foundation by determining in advance how they will make decisions and resolve conflict. Here are some tips for establishing solid relationships among partners:

- Learn about each other. How does each partner operate? Who is in charge at each organization, officially and unofficially? What are each organization's needs, pressures, and perceived roles?

- Establish both formal and informal means of regular communication. Make sure that all the key players are kept informed.

- Look at issues from the other organizations' points of view.

- Make every attempt to recognize in advance the power and control issues that may crop up between organizations.

Remember, a collaborative relationship is based on a win-win situation. It's also important to understand that all the parties in the relationship work independently, under their own supervisors and under different limitations. Communication among all the parties involved is critical.

Process (Continued)

In some collaborative relationships, the Navy uses a Memorandum of Understanding (MOU). An MOU defines the tasks to be completed and clarifies all the roles and responsibilities for all parties involved. MOUs are generally used at the headquarters level (at the Bureau of Naval Personnel (BUPERS)). A good example is the MOU used for the Transition Assistance Program (TAP) workshop.

For more information, see the Sample MOU on ***page A-53*** in the ***Appendix***.

People

The third factor that affects the success of collaboration is the people in the relationship. It's crucial to get all the key players involved as early as possible. Key players include not only decision makers, but also representatives from your potential customer population as well. After all, these are the people who will be affected most by your collaborative efforts.

A leader must also be chosen for the effort. The leader must be able to embrace the vision, perceive different points of view, and facilitate consensus among partners. Some believe that the leader should come from one of the organizations in the partnership, because that person will be very committed. Others think that a leader from a neutral organization outside of the partnership yields the best results.

Policies

The set of governing policies that each organization brings to the collaboration may also affect its chances for success. For example, one participating agency may have eligibility requirements that need to be broadened in order to provide services to the partnership's entire target population. These barriers to action have to be understood and overcome, when possible.

Resources

The last factor affecting collaborative success is the amount of available resources. The kind of resources the partnership is able to attract will determine how many people it will serve and how long it will remain in existence.

One way to generate resources is to publicize the success of the collaborative effort. Reporting that objectives are being met and dollars have been saved is one way to obtain future resources.

EVALUATING EFFECTIVENESS

Now that we've explained community interaction and given you some tips about networking and building collaborative relationships, how do you evaluate your efforts? It's very difficult to evaluate your effectiveness at community interaction. Building relationships is a very subjective thing, and it's hard to measure quantitatively.

With this limitations in mind, here are two ideas on how to evaluate the effectiveness of your community interaction:

- Encourage feedback from the people with whom you network and the other programs with which you collaborate. Do they feel everyone is gaining something from the relationship? Do they value the relationship? What could be done to make the relationship better?

- Use an evaluation form each time you network with a new resource in the community.

See the Sample Evaluation of Community Interaction on ***page A-57*** in the ***Appendix***.

SUMMARY

In this section, we covered two main areas of community interaction:

- Networking
- Collaboration

As you can see, networks and collaborative efforts go hand-in-hand; it is very difficult to separate networking and collaborating relationships. In both cases, your main goal is generally to exchange information and ideas and to work together whenever possible.

The next section of the desk guide explains supervision.

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

SECTION VI

SUPERVISION

January 1998

INTRODUCTION

This section of the desk guide covers the function of supervision. As a program manager, it is your responsibility to manage all the tasks involved in your section of the Career Development and Resource Center (CDRC). Part of this role involves getting work done through other people. That's supervision, defined in its broadest terms.

Depending upon the resources available, you could be:

- Supervising paid civilian employees.[5]
- Supervising volunteers.
- Acting as a one-person program, occasionally supervising support staff "borrowed" from the Family Service Center (FSC).

There is an established set of rules and processes involved in supervising paid civilian employees, and it's important that you work closely with your FSC Director and the specialists in your Human Resource Office (HRO). This desk guide focuses on supervising volunteers, offering guidance on supervising paid civilian employees when appropriate.

In this section, we discuss the following tasks, which are necessary for effective supervision:

- Implementation of supervision
- Quality assurance and evaluation

IMPLEMENTATION OF SUPERVISION

Whether you're working with paid civilian staff or volunteers, the basic tasks involved in implementing supervision are the same:

- Finding the right people
- Providing initial development opportunities
- Providing ongoing development opportunities

[5] You may also have military personnel working in your program, but it's unlikely you will have a supervisory role. Military personnel work for the FSC as a whole and are often placed by the FSC Director in individual programs.

IMPLEMENTATION OF SUPERVISION (Continued)

- Coaching
- Motivating
- Evaluating and rewarding

Each task is explained in greater detail below.

Finding the Right People

Naturally, a key issue in supervision is finding the right person for the program. Think about what kind of person you want. What knowledge, skills, and abilities (KSAs) does the right person for the job need to have?

Finding the right people involves the following three steps:

- Defining the job/task
- Recruiting
- Interviewing and hiring

Defining the Job/Task

Whether recruiting a paid civilian employee or a volunteer, the basic process is the same. The first, and probably the most crucial step in finding the right people is to define the job or task clearly.

You can begin by researching available information about the position. Old vacancy announcements and position descriptions, if they exist, are good resources to help you think about what you want. These documents are available from your HRO. Review the old position descriptions and ask yourself if the job has changed since then. Is this still what you want to accomplish?

Even if you're creating a new position (so no applicable position descriptions or vacancy announcements exist), old vacancy announcements and position descriptions for similar jobs are still good resources to help you generate ideas about what's needed to do the job. You may also want to talk to someone currently in a similar job, or talk to that person's supervisor(s), for insights about the position.

Once you've done a little research, think about how to define the position. Given what the CDRC is, what tasks will need to be completed, now and in the future? What KSAs are needed to carry out these tasks?

<u>Defining the Job/Task</u> (Continued)

To help generate ideas about defining the job or task, read through the sample generic KSAs listed below:

- Knowledge of the organization (the FSC) and the CDRC
- Interpersonal communication skills
- Administration skills
- Supervision/leadership skills
- Creativity
- Initiative
- Ability to work independently
- Time management skills
- Writing skills
- Research, evaluation, and data management skills
- Ability to work with a team
- Financial and management accounting skills
- Fundraising knowledge and skills
- Computer skills
- Foreign language fluency
- Marketing/influencing skills

The worksheet on the next page can be used to clearly define the job.

WORKSHEET

Defining the Job

Briefly describe the job.

Is the job full-time? Part-time? Temporary, one-time project? ___________________________

What **knowledge** would the ideal person for this job have?

What **skills** would the ideal person for this job have?

What **abilities** would the ideal person for this job have?

What are some of the immediate tasks the person would perform?

What are some long-term goals, if any, that you have for this position?

Recruiting

Recruiting is the second step in finding the right person. It is done one of two ways, depending on whether the person is paid or a volunteer.

Recruiting Paid Civilian Employees

When you're recruiting and hiring a **paid** civilian employee, you need to contact the staffing specialist at your HRO. The staffing specialist will take the information you've developed about the job and write a vacancy announcement. HRO will also handle the recruiting. It pays to be a proactive participant in this partnership with the staffing specialist. Your participation in designing the vacancy announcement helps ensure a pool of quality candidates.

At sites outside the continental United States (OCONUS), you may be drawing from a smaller pool of qualified workers. You will most likely have local nationals who are part of this pool. Local laws and/or Status of Forces Agreements (SOFAs) define local civilian labor requirements that you must follow. The hiring of local nationals is also done through the HRO; check with your HRO on anything that isn't clear to you about recruiting and hiring for the CDRC.

In both continental U.S. (CONUS) and OCONUS commands, the staffing specialist handles the recruitment process and minimally prequalifies the candidates. Then the candidates are rated, and you'll be presented with the qualified candidates. You have the choice at this point to interview any or all of the candidates. Interviewing techniques are covered later in this section.

Recruiting Volunteers/Building Collaborative Relationships

Obtain assistance from the FSC Volunteer Coordinator for recruiting, selecting, training, and recognizing volunteers. In addition to obtaining assistance from the FSC Volunteer Coordinator, you may do the following:

- Work with schools, State and local volunteer information and referral services, and job programs.

- Network internally and externally with base and community organizations (e.g., the State Employment Commission (SEC) and Navy Marine Corps Relief Society (NMCRS)).

Recruiting Volunteers/Building Collaborative Relationships (Continued)

Make sure you become familiar with the recruitment and screening process if you're not already.

Depending upon the recruiting method chosen, the next step may be to write a job ad or announcement. Look in the Sunday paper for examples of ads. A good ad defines what the job is and the KSAs that are required. It's very important that the ad clearly define the job that needs to be done rather than being just a vague announcement that volunteers are needed at the FSC.

Again, at an OCONUS command, you may be dealing with a smaller pool of potential volunteers, and you must follow any local civilian labor requirements set forth in local laws or SOFA agreements. Working with the HRO to get the word out is a good idea. People overseas are often strongly motivated to do volunteer work at the command. It gives them a sense of belonging, a chance to associate with other Americans and to act as a kind of ambassador to the host nation.

If you don't find a volunteer you're happy with, don't feel like you have to accept just anyone in the interests of time. In the long run, the wrong person for the job will end up costing you even more time. If possible, start the recruitment process again and keep looking for the right person.

Interviewing and Hiring

The third step in finding the right people is to interview and hire the right person.

Don't take just anyone or accept the first person that comes along. You need to find out if the person suits the job and the culture of your organization. And you need to get the person's "buy-in" — their belief in and support of the CDRC — so that it's a win-win situation on both sides.

There are generally two tasks in this process. They are:

- Interviewing and screening
- Hiring

Interviewing and Screening

You have the option to interview any or all of the qualified candidates.

If you're interviewing the candidates yourself, then you may want to save time by screening candidates over the phone before conducting personal interviews. A screening call is a quick way to determine if a candidate has the interest and the minimum skills necessary for the job. It allows you to decide if you want to take the next step and do a personal interview.

Interviewing and Screening (Continued)

In a phone interview, listen for the following in the applicant:

- A pleasant voice and manner
- A desire to work for the CDRC
- Enthusiasm, a positive attitude
- Good listening and communication skills
- Type of personality (Will it suit the job?)

Here are some sample questions that can be used in a telephone interview:

- What do you like best about your current (or a past) job?
- What is your previous work (or volunteer) experience?
- What achievement are you most proud of?
- What interests you most about working for the CDRC?
- What did you like best about school?
- If you could do anything you wanted for a living, what would you do? Why?

When interviewing in person, you should ask a combination of open and closed questions. Open questions require more than a one-word answer and will give you an idea of how the person feels about his/her experiences, the job, etc.

Closed questions can be answered by "yes," "no," or another very short answer. Use these types of questions when you're trying to pin down specific information (e.g., "Did you graduate from college?"). Some examples of both open and closed interview questions are listed below:

Work Experience

OPEN:

- What do you like best about your job or most recent volunteer opportunity?
- What does your supervisor appreciate most about you?
- Have you received criticism? About what?
- How would you describe your greatest professional accomplishment?
- What have you not liked about past jobs or past volunteer opportunities?
- How would you describe the perfect supervisor?

CLOSED:

- Do you prefer working alone or in small groups?
- Do you know how to use a computer?

Education

OPEN:

- How did you select the college you attended?
- How would you describe your favorite teacher/professor?
- What was the most valuable lesson you learned in school?

CLOSED:

- What college/high school class did you enjoy the most?
- What college/high school class did you hate?
- Have you completed college? If not, how many units have you completed?
- What was your major in college and, if applicable, what was your minor?

Personal

OPEN:

- How would you describe yourself?
- What are your hobbies?
- What are your strengths?
- What are your weaknesses?
- What frustrates you the most?
- If you could do anything in the world, what would you do?
- Where do you see yourself in your career 5 years from now? Ten years from now?

CLOSED:

- Do you enjoy . . .?
- Have you ever . . .?

Hiring

The hiring procedure for a paid civilian employee is often handled by the FSC Director, and the staffing specialist may be involved as well. Work closely with the person overseeing the hiring process.

Providing Initial Development Opportunities

The second task in the implementation of supervision is to teach your new employee or volunteer about the CDRC and the skills that he/she needs to perform the duties of the job. This training can be broken down into two categories:

- Orientation
- Other initial training and development

Orientation

It pays to give people a careful and complete orientation. Orientation benefits you by:

- Bringing people up to speed sooner, so they can function on their own, increasing the quantity of their work.

- Getting people going in the right direction, so that they do things correctly the first time, increasing the quality of their work.

- Letting people know what's expected, so there's a greater consistency in their work.

- Introducing the new person to other programs and people at the FSC.

Orientation also gives information about the background, services, and culture of the organization. It encourages the new people to believe in the CDRC and to work for common goals.

Components of Orientation

Below are a just a few examples of the kinds of things that can be included in an orientation:

- Notice to coworkers — This notifies people who will work closely with the new person of his/her starting date, describes the job, and gives brief information about him/her. The objective is to help coworkers adjust to the newcomer.

- Information packet — Before the starting date, the new person receives a packet of materials about the FSC, the CDRC, and the services offered. This packet includes a welcoming cover letter.

Components of Orientation (Continued)

- Welcome — A specific person is assigned to greet the newcomer on the first day and to explain the orientation procedure.

- Guided tour — This introduces the new person to other employees and volunteers and shows him/her places of immediate relevance, such as entrances, coat rooms, restrooms, photocopy machines, work space assignment, and so on.

- Job description — A detailed description of the job is provided, both in writing and verbally. It includes critical elements of the job and the performance standards you've agreed upon with the new person.

- Description of the CDRC, its mission, guiding principles, and the organizational culture of the FSC — The new person also needs to understand the Navy, the chain of command, the types of commands that deploy at your installation, and the unique challenges that Navy families face during deployment. In addition, explain to the new person any special needs of the CDRC's target populations.

- Office equipment — The new person is taught to use the office equipment, i.e., telephones, fax machines, computers, and photocopiers.

- Confidentiality — The new person must be informed about the rules on confidentiality, which is a crucial aspect of the entire FSC. Someone conducting the orientation must explain what is appropriate behavior. Confidentiality training is mandatory and is carried out at the local level. The new person must sign a form, showing agreement to the rules of confidentiality.

Conducting Orientation

Think about who can handle what components of the orientation. It's important to involve other CDRC staff members, the FSC Director, and other FSC staff as much as possible. This involvement helps the new person in two ways:

- It introduces the new person to many of the people he/she will be working with, making the newcomer feel more at home.

- It sends the message that orientation is important and the FSC is committed to its people.

Conducting Orientation (Continued)

In addition to thinking about **who** should conduct the different parts of the orientation, also think about **how** to do it. Don't overwhelm the newcomer with too much information at once. If possible, stretch the orientation out over time. Present the components according to:

- What information the newcomer needs first in order to start doing the job.
- What information the newcomer cares most about (e.g., the job, supervisor, coworkers).

Other Initial Training and Development

The goal of initial training and development is to begin demonstrating the skills needed for the newcomer to do the job.

In order to determine the content of the training, review the performance objectives. What does the new person need to know or need to be able to do? Break down that information into separate tasks and think through each step required.

Shown below is an example of a task breakdown sheet.

TASK BREAKDOWN	
Steps in Task *(What the worker must do)*	**Key Points** *(What the worker must know in order to do the step correctly and efficiently)*
1.	
2.	
3.	

Once you know the content of the training, think about who will present this information and how it will be presented. Will you provide the training yourself? Will you assign an experienced staff member to do it? Is there applicable training being provided by another program or organization that your new person can attend?

Other Initial Training and Development (Continued)

How to present training has been the subject of hundreds of books. Plus, we discussed customer training in Section III, Customer Services, of this desk guide. All the same guidelines apply for training employees. In addition, here are a few simple tips to remember when presenting information to new employees:

- First, prepare the new person by explaining the value of the task and why it's important to do it correctly. Find out if they already know how to do any portion of it, based on past experience.

- Demonstrate or explain the task, one step at a time, emphasizing the key points of information as you go.

- Allow the new person to complete the task. Make sure you are available to give him/her feedback and continue to allow the person to practice until you're sure he/she understands and can do it.

- Follow up by turning the task over to the new person. Check in periodically to answer questions, correct errors, and give positive feedback.

Other strategies for initial training and development include:

- Shadowing — The new person follows, or "shadows," an experienced staff member to learn the job. This technique is especially helpful when the new person can learn how to present classroom training by observing an experienced instructor.

- Mentoring — An experienced staff member is assigned as a mentor to the newcomer and deals with the newcomer's whole career, from professional development to emotional well-being. Mentoring goes beyond just training; the mentor also acts as a trusted counselor or guide.

If you have questions about initial employee training, consult with the FSC Director or other staff members with training expertise.

Providing Ongoing Development Opportunities

The third supervisory task is to provide **ongoing** development and training opportunities. Ongoing training allows your people to continue to grow and develop in order to meet the CDRC's future goals. Preparing for the future means looking at the job requirements and what your people are doing now. Write objectives based on getting to the desired goal. Then determine the best way to meet those objectives through training. Keep in mind that this process may or may not be applicable for paid civilian employees, depending upon whether they already have individual development plans and whether you are their supervisor.

Below are some possible topics for ongoing training:

- Learning about the job market and the job search process.
- What difficulties spouses are having in making career decisions.
- What the service member experiences when leaving the Navy.
- The emotional aspects of transition.
- Marketing techniques.
- Special needs communities.
- Adult learning theory and presentation practices.

Ongoing training and development is necessary, but sometimes obtaining the resources to do it is a challenge. Explore building collaborative relationships with community organizations that can offer you resources, advice, and information. For example, local colleges and universities may have people who can help educate your staff about how to design, develop, and present training.

Listed below are some training ideas, ranging from more formal methods of training that require resources to informal, cheaper methods of training:

- Workshops/seminars.
- Conferences.
- Courses.
- Videos/audios/books.
- On-the-job training.
- Association memberships.
- Bag lunches at the FSC on specific topics.
- Speaker's bureau.
- Informal training by others within the FSC on subjects they know best.
- Cross-training of people in each other's jobs.
- An office visit/field trip.
- Training by someone with whom you are working in something he/she learned at a seminar, workshop, conference, or association meeting.

Providing Ongoing Development Opportunities (Continued)

Remember, you need to develop and grow as a supervisor too. Be sure to block out training and development time for yourself, as well as the people you supervise.

Coaching

The fourth supervisory task is coaching. When people are given new tasks to complete, you coach them by observing and monitoring them and by giving them feedback on their performance.

When you give someone a new task, be sure that you explain it clearly, including the standards for successful completion. Encourage the person to ask questions about anything he/she doesn't understand. Check back with the person periodically, answering questions, correcting errors, and giving feedback.

In order to be effective, your feedback should be:

- Specific — Be sure the person understands the nature of the feedback and the reason for it (e.g., "You addressed that person's problem this morning efficiently and professionally" is much more specific than "You've done a good job lately.").
- Prompt — Give your feedback immediately after the performance.
- Descriptive — Talk about what you've heard, seen, or experienced, rather than any conclusions you've drawn from your observations.
- Sensitive to feelings — Note this especially if the person seems particularly busy or emotionally upset. Feedback given at the wrong time can be more harmful than beneficial.

After giving feedback, always follow up with the person to review his/her progress.

Motivating

Another supervisory task is to motivate your people to do the best job that they can.

Keep in mind that your own attitude about your people affects their motivation and morale. If you think that people work only when they're made to work, then your staff will tend to become that way. If, on the other hand, you believe that people can be trusted to do their jobs, then they usually will.

Motivating (Continued)

Another important thing to remember in motivating people is that your personal style may not match theirs. The things that motivate you to succeed may mean nothing to them. Review what you learned about the new person from the interview and observe his/her style on the job. What motivates this person to do well? Some examples include:

- Personal appreciation and thank yous
- Positive feedback
- Autonomy
- New responsibilities
- Recognition
- Status

Once you understand people's personal styles and what they value, it becomes much easier to motivate them. Keep in mind that, when working with volunteers, publicly recognizing their contributions is a crucial motivator.

Evaluating and Rewarding

The last task in supervision is evaluating and rewarding your people. The process for paid civilian employees is somewhat different from that for volunteers.

Employee performance reviews are written by the supervisor, using the position description and the performance objectives agreed upon by the supervisor and the employee.

If you're dealing with volunteers, you still want to evaluate how well the person carried out certain tasks and recognize or reward good performance.

Conducting regular performance reviews is a good way to evaluate and reward people. Regular reviews offer a number of benefits, including:

- Both you and the person involved have a chance to review how well the individual is performing according to previously agreed-upon performance standards.

- You have the opportunity to give feedback on the person's performance and progress.

- The individual can provide you with information about his/her performance and/or progress that you may not already know.

The process involved in conducting a performance review is discussed on the following page.

Conducting a Performance Review

There are five basic steps in conducting a performance review:

- Preparing
- Setting the stage
- Discussing performance
- Problem solving
- Summarizing and following up

Each step is explained in more detail on the following pages.

Preparing

The first step is preparing to meet with the person. Gather any notes you have taken on the individual's performance or pertinent examples of his/her work. Review the description of the job and the performance standards you agreed upon with the person (as was recommended earlier).

After reviewing your materials, develop objectives for what you want to accomplish in this review and come up with an agenda. Set a time to meet with the person and stick to it, making sure that you won't be interrupted during that time.

Prepare the person for the performance review by telling him/her the purpose of the meeting, how long you expect it to take, and generally what you plan to discuss.

Setting the Stage

As you begin the meeting, set the stage for the other person. Explain again the purpose of the review and the agenda and encourage the other person's active participation.

Discussing Performance

The third step in conducting a performance review is to discuss each element of the person's performance in reference to the agreed-upon performance objectives for the job. Be very specific with your feedback; don't use generalizations. Be sure to ask for the person's perceptions of his/her own performance and progress.

Problem Solving

The next step is to begin problem solving. Elicit the person's ideas for improvement as you discuss possible causes of problems and actions to take in the future. Don't compare this individual with others working for you and don't get involved in an argument. Stick to the facts and move on to the next issue.

Summarizing and Following Up

The fifth step in conducting a performance review is to summarize both your perceptions and the other person's perceptions. In addition, summarize your overall evaluation of the individual's performance, emphasizing strengths. Conclude the performance review by scheduling a time for followup as appropriate.

Rewarding Performance

Naturally, rewarding people for good job performance is an excellent motivator. As was described earlier, there are different types of rewards from which to choose, based on the individual values. These include:

- Recognition luncheons (especially good for volunteers or other organizations working with you).
- Recognition at a staff meeting.
- Mention in a newsletter or other base publication.

In this part of the desk guide, the six basic tasks in supervision were explained:

- Finding the right people
- Providing initial development opportunities
- Providing ongoing development opportunities
- Coaching
- Motivating
- Evaluating and rewarding

In the next part of this desk guide, you will learn about quality assurance and evaluating the effectiveness of your supervision.

QUALITY ASSURANCE AND EVALUATION

Whether you are supervising paid civilian employees or volunteers, you must always ensure quality. Everyone working for the CDRC must work together to provide customers with quality products and services. The information below addresses how to evaluate the quality and effectiveness of your supervision.

Evaluating Effectiveness

Evaluation of your performance of supervisory tasks is an ongoing process. As in any other evaluation, you'll want to check your performance against your supervisory goals. For example, perhaps you wanted to recruit and train a certain number of volunteers. Your effectiveness can be measured against whether or not you were able to meet that goal.

In addition, look at each of the six supervisory tasks explained earlier in this section (e.g., finding the right people). Assess how well you think you have carried out these tasks.

Here are some sample questions that may help you evaluate your performance as a supervisor:

- Have you met your part of the management agreement with your people?
- Are your people consistently coming in to work?
- Do they seem to be happy?
- Are you retaining them?
- Do you think the orientation and training you provided was effective? In other words, how quickly were they able to perform independently?

In addition, make sure that you receive feedback from your people on your performance as a supervisor and on the effectiveness of the training they receive. There are a variety of ways to do this, from informal conversations to filling out evaluation forms.

The effectiveness of staff training should be measured by how well the stated objectives of the training were met, and whether participants were able to take what they learned and apply it successfully in their jobs.

SUMMARY

In this section of the desk guide, we covered two main areas of supervision:

- Implementation of supervision
- Quality assurance and evaluation

This information should provide you with a solid base for supervising your people. Effective supervision will improve their performance and enhance the effectiveness and efficiency of the CDRC.

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

SECTION VII

MARKETING

January 1998

INTRODUCTION

This last section of the desk guide covers the function of marketing. Marketing is the process of conducting research on potential customers to determine the best way to inform them about the Career Development and Resource Center (CDRC).

Marketing is done on two levels: 1) Marketing for the entire Family Service Center (FSC) and 2) marketing for the core FSC programs. The FSC may be responsible for both of these levels. On the other hand, marketing the CDRC may be solely up to you. In any case, this section of the desk guide focuses on you as the person responsible for marketing the CDRC. Marketing is an integral part of the CDRC's success.

Effective marketing is crucial because it doesn't matter how good your services are if potential customers don't know that these services exist. Marketing ensures that the target audience understands the CDRC and has a positive perception of it. Marketing also motivates potential customers to come into the FSC and use its services.

One of the key things to keep in mind when deciding how to market the CDRC is whether the customers want what you're trying to sell them. To make this decision, you have to know who your target audience is and what its needs are. Your services must be designed to meet these needs. This is called program planning.

It's also important to remember that program planning and marketing work hand in hand. The program planning process ensures that the services match customer needs, thus driving marketing efforts. And the data received from potential customers through marketing research are used to further refine program planning.

Functions of Marketing

As indicated above, marketing is rooted in careful program planning and research. Marketing itself has two related functions:

- To raise awareness about the CDRC.
- To motivate people to use the CDRC appropriately.

The purpose of the first function, raising awareness, is to make people aware of the CDRC and its services.

Functions of Marketing (Continued)

The second function, motivating people to actually use the CDRC, is sometimes called advertising. Advertising sells a specific product or service and calls the potential buyer to action. For example, you want to persuade members and their families that a workshop on the job search process is valuable and that they should attend. You may also want to convince commands to refer people to the CDRC's services and to continue supporting the CDRC with resources.

These marketing functions have related tasks that must be successfully completed. These include:

- Organization of marketing resources
- Implementation of marketing:
  - Conducting market research
  - Developing a marketing plan
  - Implementing the marketing plan
- Quality assurance and evaluation

The following information explains each of these tasks in detail.

ORGANIZATION OF MARKETING RESOURCES

Thinking about the resources available to you is part of developing an effective marketing plan. Staff and financial resources may be limited, but creative thinking and building linkages to other Navy or community organizations can allow you to extend your marketing reach. Marketing resources break down into four basic categories:

- People resources
- Community resources
- Fiscal resources
- Physical/material resources

This part of the desk guide describes each of these resources and how best to organize them.

People Resources

Think about who might relay information about the CDRC and market it to others. There's you and your staff, of course. Think beyond that. Wouldn't it be effective to get other people talking about the CDRC? After all, your time is limited, so you want your efforts to go a long way. There are people out there that, by the nature of their work, touch and influence many other people. Here are some examples of people who may be able to raise awareness about the CDRC:

- The FSC Director.
- Other FSC staff members.
- Commanding Officers (COs)/Executive Officers (XOs)/Command Master Chiefs (CMCs)/Command Career Counselors (CCCs).
- Chaplains (military and civilian).
- Ombudsmen.
- Spouses in leadership roles.
- Community leaders.

Now think about people who can offer you different kinds of skills. For example, do you know anyone who's good at graphics? Writing? Networking? Public relations? Video production? Planning special events? Some people who can help include:

- The Public Affairs Officer (PAO).
- Key people at each of the base publications (e.g., base newspaper, FSC newsletter, Plan-of-the-Day (POD)).
- The audiovisual specialist on the base.
- The person who handles printing on the base.

Now look beyond some of these more obvious connections. There may be other people with skills you need, such as:

- FSC staff members with skills beyond their current job (e.g., military members working in the FSC).

People Resources (Continued)

- Members of your family.
- Friends.
- Your customers.
- Employees of community organizations.

Community Resources

Building external linkages to the community is a key task in marketing. Developing these contacts allows you to get your message out to a broader audience. Some useful community resources for marketing include:

- Other service providers.
- Local community publications.
- Local television/radio stations.
- Locales and organizations where people gather regularly (e.g., hospitals, schools, retail stores, YMCA, health clubs, and restaurants).

Organizing People and Community Resources

Plan to personally visit as many of the people and community resources listed above as you can, especially those who can raise awareness about the CDRC. Organize all the names you've gathered in a rolodex or a computerized list. You'll want to network with some of these people, sending them press releases and/or offering them briefings about the CDRC. You may want to post information in the locales or organizations mentioned above as well.

You can organize other names by the skill or service offered. For example, you could have rolodex cards, file folders, or computerized records with headings like "Graphics," "Eldercare," "TV

Fiscal Resources

Marketing must be done as cost-effectively as possible. The items listed below are examples of things that should be included in a marketing budget:

- Costs for collecting market research data.
- Writing/design of marketing materials (whether done in-house or by a contractor).
- Printing costs.
- Conference attendance/membership in trade or community associations.
- Direct mail costs.
- Audiovisual production expenses.
- Costs for special events, giveaway items, or incentives.

It's important to understand that even if **you** don't have money, someone else does. Think about the items listed above. Who has the kind of resources you need? Is there a way you can access these resources?

In addition, remember that bartering is a legitimate way to get the resources you need. Do you have some knowledge, skill, ability, contact, or resource that could be bartered to get the marketing resources you want? Consider these methods when trying to obtain the fiscal resources you need for marketing.

Physical/Material Resources

Physical and material resources are also needed for effective marketing. Examples of these are listed below:

- Telephone, fax, and DSN
- Copier or use of copier
- Dedicated computers and software
- Office supplies

Having a general idea of the resources available to you will help you to develop a realistic marketing plan. And once you have a marketing plan, you can begin obtaining and organizing the specific resources you need in order to carry it out.

Next we will discuss conducting market research and developing a marketing plan.

IMPLEMENTATION OF MARKETING

Like program planning, effective marketing requires research and planning. There are three basic steps to effective marketing:

- Conducting market research
- Developing a marketing plan
- Implementing the marketing plan

This part of the desk guide looks at each of these steps separately.

Conducting Market Research

From your program planning, you'll know a lot about your potential customers, also called your target audience. But designing effective marketing that will reach them demands that you find out more — that you conduct market research.

The first step is to define what you are researching and decide what you need to know. Listed below are the kinds of questions that need to be answered in order to develop a marketing plan. Think of these as the "4 Ps" — products, people, place, and price — of market research:

PRODUCTS

- Does the CDRC and its services match your customers' needs?

  Although this is really a program planning question, it has critical implications for marketing. If you find that your customers don't want what you're trying to sell them, you have two choices: Modify the product or attempt to modify their awareness or perception of the product. Deciding to modify the product is an example of how market research affects program planning. Attempting to modify awareness or perception of the product is marketing.

- Do your potential customers understand what kind of services you offer?

  For example, in one focus group at an FSC, participants thought that the CDRC was only for job placement and that using the CDRC guaranteed the spouse or separating service member a job. It's crucial to be very clear in your marketing message about the CDRC's purpose, whom it serves, and the types of services it offers.

Conducting Market Research (Continued)

- What do your potential customers want and/or need to know about the CDRC in order to make a decision to use it?

- How do your potential customers currently perceive your products and services?

PEOPLE

- Who is your primary target audience? Service members? Spouses? Commands? Is there more than one target audience?

  Again, this kind of demographic information will overlap with the data gathered during the program planning process. Any new or additional information can be used to refine program planning.

- How does your target audience(s) get information? From base newspapers? Fliers? Newsletters? Word of mouth?

PLACE

- Where's the best place to offer your services? In the FSC or in some other place closer to potential customers?

- What's the best time of day to offer your services?

  Again, the answers to these questions will overlap with the information gathered during the program planning process and can be used to refine your program planning.

- Are potential customers able to find the FSC? Is there enough parking? Are the entrance and reception areas welcoming to them? Are there any other physical barriers that are discouraging their use of the CDRC?

Conducting Market Research (Continued)

- Do your customers feel welcome by the staff? Do they feel they are receiving good customer service?

  If your research shows that your customers feel welcome, then good customer service is something to stress in your marketing message. If the perception is that customer service needs to improve, then you need to improve it, and in your marketing you need to emphasize to your customers your attempts to do better. Again, improving customer service by whatever means (e.g., giving more training to staff) is a larger issue than marketing.

- Are there any psychological barriers discouraging the use of the CDRC? Do potential customers think that using the CDRC makes them look weak? Or negatively affects their career? Are they concerned about confidentiality?

  Again, this information will overlap with data already gathered for program planning.

PRICE

- How do your potential customers perceive the whole "price" issue (e.g., that using the CDRC is free)? Is this a selling point for them? Or do they perceive the service as less valuable because it is free?

  Price is a difficult concept in terms of the FSC. In a way, it's a selling point that the services offered at the FSC are free. However, some people feel that customers devalue services for which they don't pay. Your customers' perceptions will drive how you address this issue in your marketing. For example, you could say that services are "provided to you at no cost by your command" or that services are "part of your Navy benefits package." Or you can approach the topic by looking at what these same services would cost in the civilian community and talk about the savings for service members and their families.

You'll need the answers to these kinds of questions in order to develop an effective marketing plan. Asking these questions is called market research. The following pages will explain:

- Methods of market research, or how to collect the data
- Methods of data analysis
- Checking of market research and data analysis for accuracy

Methods of Market Research — Data Collection

The methods for conducting market research are the same as those used in a needs assessment. These methods include:

- Review of pre-existing data
- Focus groups
- Surveys
- Interviews

Review of Pre-Existing Data

Reviewing data that have already been gathered about your target audience is a good starting point in market research. This review will also show you the kind of questions that were asked. It's inexpensive and can save you time and effort. Sources of information for this review include:

- Other marketing studies done at the FSC.

- Marketing data from community agencies and organizations that also serve your customers (e.g., social services and the American Red Cross).

- Marketing studies from businesses that also serve your customers (e.g., retail stores and realtors).

- Demographic studies of base or Navy-wide populations.

- Demographic or marketing studies conducted by the local chamber of commerce.

Although reviewing any pre-existing data is certainly a necessary first step, be aware that past studies may be dated, and you may have to confirm or negate old findings based on your own research.

Focus Groups

A focus group is a data collection method by which a group of people is assembled to acquire responses to a particular topic. For example, you might gather a group of people from the target audience to find out how they perceive services offered by the CDRC. A focus group will give **qualitative** rather than **quantitative** results. It's a very useful marketing tool because it can give you a better "feel" for the target audience.

Focus Groups (Continued)

A typical focus group consists of five to nine people. The group works with a person called a moderator or facilitator to express opinions and attitudes about the topic discussed. A typical session runs from 1 to 2 hours.

Here are the kinds of questions you might ask a focus group:

- How do you currently perceive the CDRC and/or the services it offers?
- Using the CDRC has the following benefits: (list them). Which of these is the most important to you?
- What information would you need about the CDRC in order to make a decision about using it?
- Describe the services you think the CDRC offers.
- Describe your last experience using the CDRC.
- What would discourage you from using the CDRC?
- How do you currently receive information about Navy programs and services?

Keep in mind that these questions may not be applicable for every group. You must develop questions based on what you're trying to find out from the group.

For more detailed information about focus groups, see ***pages II-14*** through ***II-17*** in Section II, Program Planning.

Surveys

Surveys are a convenient method for gathering data from large target audience groups and can provide complete data on exact questions. Survey forms can be completed by the individuals being surveyed or filled in by an interviewer asking the survey questions.

Topics on a market survey could include the target audience's:

- Demographic information.
- Current knowledge of the CDRC and its services and its desire to learn more.
- Current perceptions of the CDRC.
- Current use of the CDRC.
- Preferred sources of information (e.g., word of mouth and newspapers).
- Physical or psychological barriers influencing the use of the CDRC.

Page A-1 in the ***Appendix*** shows an example of a survey used for needs assessment. To adapt this survey for market research, you could add questions such as those in the example on the next page.

SAMPLE MARKET SURVEY QUESTIONS

1. Listed below are a number of statements about the Career Development and Resource Center (CDRC) at the Family Service Center. This section asks for your feedback on whether these statements are accurate. Using the rating system below, circle the number or symbol that best represents your answer to each question.

?	1	2	3	4	5
Don't Know	Definitely Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Definitely Agree

a. I know enough about the services offered by the CDRC to make an informed decision about whether to use it.

? 1 2 3 4 5

b. The CDRC staff are courteous and prompt.

? 1 2 3 4 5

c. Using the CDRC has no negative effect on a service member's career.

? 1 2 3 4 5

2. How did you hear about the CDRC and services that you or your family might need?

- ☐ I didn't hear anything
- ☐ Base newsletter/ newspaper
- ☐ Television
- ☐ Spouse
- ☐ Ombudsmen
- ☐ Friends/neighbors
- ☐ Local newspaper
- ☐ Coworkers
- ☐ Children
- ☐ Plan-of-the-Day/Week
- ☐ Base bulletin boards
- ☐ Radio
- ☐ Base command
- ☐ Fliers
- ☐ Base command
- ☐ Other (Please explain) ____________________

Surveys (Continued)

Although surveys provide solid, quantifiable data, keep in mind that the response rate is often low. You can increase the response rate by offering a giveaway or a small incentive to people for completing the survey. (See ***page VII-31*** of this section of the desk guide for more information on giveaways and incentives.)

For more information about choosing the size of the sample and writing survey questions, see ***pages II-12*** to ***II-14*** in Section II, Program Planning.

Interviews

Interviewing is relatively inexpensive and easy, and it's one of the most effective ways to collect data from influential target audience members like COs, XOs, and CMCs.

For more information about using interview data, writing interview questions, and conducting interviews, see ***pages II-17*** to ***II-19*** in Section II, Program Planning.

Methods of Data Analysis

Once all of the market data are collected, the next step is to analyze the data. This analysis should answer all of your original market research questions (i.e., the "4 Ps" of market research).

Analysis of your market research data, along with the information already gathered for program planning, will become the foundation of your marketing plan for the CDRC.

For more information on how to analyze data, see ***pages II-19*** to ***II-23*** in Section II, Program Planning.

Checking of Market Research and Data Analysis for Accuracy

Nearly every assumption and decision you make in your marketing plan will be based on your market research data. Therefore, it's crucial to ensure that your data are accurate by:

- Using multiple methods of collecting data and seeing whether different methods confirm previous findings.

<u>Checking Market Research and Data Analysis for Accuracy</u> (Continued)

- Collecting data from a large enough sample of your target audience.

- Making sure you have a representative, random sample of your audience.

It's also important to check the accuracy of your research data over time. You'll want to conduct new market research every 12 to 18 months to answer questions like these:

- Have your target audiences changed?

- Do your potential customers have different needs?

- Are your potential customers still getting information from the same sources? Are there new sources?

- Are your target audiences more aware of the CDRC?

- Are your target audiences using the CDRC? Are new services needed?

Keep in mind that you can also check your findings more often in a less formal way. Use workshops, briefings, meetings, and conversations as an opportunity to ask knowledgeable people about their perceptions of your target audiences.

Checking your market research and data analysis for accuracy will help ensure a sound marketing plan.

Developing a Marketing Plan

Once you've completed market research and data analysis, you're ready to begin your marketing plan. In developing a marketing plan, you're deciding what kind of message you want to send to your target audience and what the best medium is for sending it. There are five steps in developing a marketing plan:

- Setting marketing goals and objectives
- Developing the message(s)
- Choosing the medium
- Setting schedules
- Getting approval

Each step is explained on the following pages.

Setting Marketing Goals and Objectives

The first step in developing a marketing plan is to define goals and objectives. As you begin to do this, you'll have to decide how to "position" the CDRC. Positioning means defining the CDRC, both in terms of the customers you serve and your competitors.

Since the CDRC has multiple target audiences (e.g., the command, married members, single members, spouses), your marketing of the CDRC to each of these audiences will be a little different. Here are examples of the types of questions you will need to answer:

- Which target audience is most important? (You have to prioritize them; the CDRC can't be "all things to all people.")
- How will you position the CDRC to the command? (Since you want the command to refer members to the CDRC, their "buy-in" is critical to the success of the CDRC.)
- Will you market the CDRC to the single service member?

You also need to consider other programs, either military or civilian, that offer services similar to yours. Are there any? If so, you must be prepared to tell people in your target audience why they should come to you — why the CDRC is special. Is it because of a quality staff? Their knowledge and experience of the challenges unique to Navy life? Determine why the CDRC is unique and explain this to your target audience.

Your goals and objectives will be based on the decisions you make about positioning. A goal is what you want to do or accomplish, and it's stated in general terms. Do you want to increase awareness of the CDRC? Increase support for the CDRC? Increase the number of people using the CDRC? These are all examples of goals.

Your goals may also be based on what you discover from your market research questions (i.e., the "4 Ps"). For example, you might want to change your audience's perception of your product or the customer service offered. These issues can all become marketing goals.

Objectives define the criteria by which the goal will be reached. They answer the questions: What do you want to happen, and how will you know when it does? Objectives are more specific and indicate how progress will be measured. Here are some examples of goals with their accompanying objectives:

GOAL:	To increase command support of the CDRC.
OBJECTIVE:	To increase the number of command referrals by 10 percent over the next 12 months.

Setting Marketing Goals and Objectives (Continued)

GOAL: To increase awareness of the CDRC.
OBJECTIVE: To increase the number of members aware of the CDRC by 5 percent, as indicated by interview data, over the next 6 months.

Be realistic when setting your goals; pick those that you think are reasonable to achieve. For example, prioritize the CDRC's multiple target audiences and develop individualized marketing efforts accordingly. Don't try to be all things to all people.

If you try to tackle too much in your marketing, you raise expectations that you can't fulfill. In other words, you market beyond your ability to serve your customers. On the other hand, if you do too little, your efforts may go unnoticed.

For more information about how to set goals and objectives, see ***pages II- 24*** to ***II-27*** in Section II, Program Planning.

Developing a Message

The second step in developing a marketing plan is to develop a message. A marketing message is a concise capsule of whatever you want to tell your target audience. Usually, the message comprises the purpose and the services of the CDRC. The message is an underlying theme in all your marketing pieces, whether or not it's stated directly to the target audience.

All the market research and analysis pays off in the development of this message. From your market research and analysis, you'll know what concerns, perceptions, or issues your target audiences have about the CDRC (i.e., the "4 Ps"). The marketing message allows you to address those concerns, perceptions, and issues. You'll take all you know about your different target audiences and decide **what** and **how** to tell them about your program.

How you craft this message is dependent upon the target audience. For example, your message to COs about the CDRC is likely to be very different from your message to spouses.

To be effective, your marketing message should take into account the following questions:

- What concerns, perceptions, or issues need to be addressed?
- What's in it for the target audience? What's the benefit?
- What do I want the target audience to do or feel after hearing this message?

Developing a Message (Continued)

- What kind of information does the target audience need to do or feel this?
- What does the target audience need to know about accessing the service?
- What kind of tone is appropriate for this target audience? Formal? Informal? Full of details or full of feelings?

Below are examples of marketing messages for the CDRC that address different target audiences.

TARGET AUDIENCE	MARKETING MESSAGE
Service Members[6]	The CDRC offers services that can help you transition from the military to the civilian lifestyle.
Spouses	The CDRC offers services to help Navy spouses make difficult career decisions.
Commands	The CDRC provides service members and spouses with transition and career development assistance. This way service members can keep their minds on the task at hand.

When developing your marketing messages, never overstate what the CDRC has to offer. It's better to give your potential customers realistic expectations instead of disappointing them when the CDRC can't deliver what the marketing promised.

Choosing the Medium

Now that you've developed a basic marketing message for your target audience, the next step is to decide on the best way of delivering that message. Again, your market research should help you answer this question: How does your target audience prefer to get information?

The way a message is delivered is called the medium. The choice of a medium determines how you develop the content material. Keep in mind that you may have to use different media to deliver one message or you may sometimes be able to use one medium to deliver several different messages. Some examples of different ways to deliver a marketing message are listed on the following page.

[6] Keep in mind that you may develop different messages within this service member category (e.g., a separate message aimed at officers, enlisted service members, and so on).

<u>Choosing the Medium</u> (Continued)

- Direct personal contact from you and your staff with members of your target audience. A few examples of this direct contact include:

    - Networking
    - Attending briefings and conferences
    - Correspondence
    - Promotions

- Print materials

    - Articles and ads in base and community publications
    - Posters
    - Brochures
    - Fliers
    - Direct mail

- Audiovisual materials

    - Radio/television spots
    - Video programs

Working in all of these media is explained in more detail on the following pages.

Selection Criteria

Here are some criteria for selecting a particular medium:

- Is the medium appropriate for the message? For example, if you have a lot of detailed information to impart, a poster is probably not a good choice of medium. A brochure that potential customers take with them may be more appropriate.

- Is the medium appropriate to the audience? For example, let's say you want to develop a handbook describing available services. Is your target audience made up of readers? If not, is there a more visual way to present this information?

- Is the medium cost-effective? For example, it costs nothing to put messages up on an existing FSC or base marquee sign. However, if your target audience never passes by that way to see the sign, it gains you nothing.

Selection Criteria (Continued)

- Is the medium within fiscal, staff, and time allowances? For example, producing a quality television spot on film about the CDRC may attract a lot of attention, but it's probably outside of your budget. You have to be financially and technically able to produce the marketing piece.

Sample Marketing Plan

So far in the process, you've articulated your marketing goals and objectives and developed an underlying theme or message for each target audience. You've also chosen one or more ways to get these messages out to the target audience. An excerpt from a larger marketing plan might look like this:

MARKETING PLAN	
Goal:	To increase command referrals to the CDRC.
Objective:	To increase the number of command referrals by 10 percent over the next 12 months.
Target Audiences:	COs, XOs, CMCs.
Message:	The CDRC enhances operational readiness by offering services that help service members and spouses prepare for relocation and/or separation from the Navy.
Media:	Direct contact, print materials (articles and a brochure).
Tasks:	Develop a briefing for CO and XO. Write articles for base and FSC newsletters, linking the services to operational readiness. Develop a brochure to leave behind after the briefing. Conduct the briefing.

See ***page A-58*** in the ***Appendix*** for the blank form titled "Marketing Plan Notes." You can use this form to develop your marketing plan.

Sample Marketing Plan (Continued)

You may also want to test some of your messages and the media you've chosen on your target audience. One way of doing this is to hold a focus group to get their reactions.

Setting Schedules

The next step in developing a marketing plan is to establish when and how often to perform the tasks in your plan. Here are a few things to keep in mind:

- Market regularly; build momentum by establishing cycles for doing direct mail, distributing fliers, etc.
- Tie marketing activities to other special events on the calendar (e.g., doing promotions around the holidays or deployment cycles).
- Don't market a service before it's available.

In addition to specifying **when** and **how** often these marketing tasks must be completed, also note **who** is responsible for getting them done.

Getting Approval

The last step is to get approval for your marketing plan. Work with the FSC Director to get his/her input and approval. Keep in mind that you may be working with others at the FSC on joint marketing efforts, and all of you need to be involved in the approval process. (Two examples of joint marketing efforts are an anniversary celebration of FSCs, or recognition of Military Spouse Day.)

If your marketing plan involves organizations in the community, other installations on base, or other FSC programs, be sure to involve them in the planning and get their support/approval as necessary. The base Public Affairs Officer (PAO) can probably help you with going through any necessary clearance channels and may have to approve all or parts of your plan.

The next part of the desk guide explains how to implement your plan, with some tips and guidelines on different types of marketing.

Implementing the Plan

The information below describes tips and techniques on how to handle day-to-day concerns in different types of marketing efforts. The areas covered include:

- Direct contact/public relations
- Print media
- Audiovisual media
- Promotions

Direct Contact/Public Relations

Your direct contact with your target audiences is also called public relations. It's a way of getting information about the CDRC directly to target audience members. Public relations is a day-to-day effort — very important, but difficult to schedule in your marketing plan.

This direct contact is especially crucial with key members of target audiences who can give you financial support, materials, and even referrals to the CDRC. They can raise awareness about the CDRC and support in the audiences they influence. These key people are:

- COs
- XOs
- CMCs
- Chaplains

Depending on the audience you want to reach, other key people you may want to contact include:

- Ombudsmen
- Command Career Counselors (CCCs)
- Command Financial Specialists
- Spouses in leadership roles
- Community leaders/providers of services

There are a number of ways to make direct contact with these people, including:

- Personal networking
- Briefings
- Conferences
- Personal correspondence

Each of these methods of contact is discussed on the following pages.

Personal Networking

Personal networking is the most basic and important public relations activity. Its aim is to establish relationships with key target audience members. Networking involves meeting with them, sharing the latest developments, receiving feedback, and thanking them for their support. Here are some networking tips:

- Work with your FSC Director to determine who is responsible for maintaining which relationships with key target audience members (e.g., CO, XO).

- Establish a record (file card or computerized) of each key audience members you've contacted, what was discussed, any followup that was required, and when it was completed. Also include notes about the person's special interests.

- Make sure that you have business cards that you can leave behind.

- Watch for newspaper articles, cartoons, or other items of interest to these key people. Send the item(s), along with a handwritten note and business card.

- Sponsor an "open house" event to do a special briefing of key target audience members and issue personalized invitations.

- Find ways to thank people either personally, in writing, or publicly for their support and help.

Briefings

Briefings are prepared presentations about the CDRC to key target audience members. Briefings can help you gain political support, build referrals, and disseminate your marketing theme and up-to-date information about the CDRC. Tips on briefings include:

- Conduct briefings in small groups for greater impact.

- Provide written materials for participants to take with them for later reference. Package them in an attractive, well-organized way. Use graphics whenever possible for visual interest.

- Keep the presentation concise (no more than 20 minutes). Leave time for questions and answers.

Briefings (Continued)

- Hold the briefing in a comfortable, functional room, whenever possible.

- If more than one person will be giving briefings on the CDRC (e.g., FSC Director and other staff members), it's a good idea to develop a set of overheads and a script to keep the message consistent.

Conferences

Attending conferences is another form of public relations. Your attendance allows you to raise awareness about the CDRC, disseminate information, and build credibility. Conferences may be sponsored by Navy activities/service providers, community groups, the chamber of commerce, professional associations, etc. Here are some guidelines on using conferences as a marketing opportunity:

- Seek out invitations to the appropriate conferences and get your name on the mailing lists. (Your CO may be a member of the local chamber of commerce and able to get you an invitation.)

- Volunteer to speak on pertinent topics.

- If possible, set up a literature table, display, or information booth. If that's not possible, at a minimum, bring brochures or fliers to distribute and plenty of business cards.

- Review the attendance roster for key individuals. Seek the individuals out and introduce the CDRC, following up personally after the conference.

- Use the attendance roster as a source for new names for the mailing list.

Personal Correspondence

Writing to key target audience members is an efficient, cost-effective means of maintaining the relationship. Here are some tips:

- Maintain an updated mailing list (print or computerized) of key target audience members. Make sure you can access the address on the computer by subgroup (e.g., commands, community groups, professional associations).

Personal Correspondence (Continued)

- Use personal correspondence to thank people, as a networking followup, or as an update on issues of concern to the individual.

- Organize your personal correspondence files by the person contacted. Keep track of dates in order to maintain regular communication.

Print Media

Different types of print media may be used both to raise awareness about the CDRC and to sell a particular product or service. Some examples of print media are:

- Base publications
- Community publications
- Direct mail
- Other types of print media (e.g., posters, fliers, and brochures)

The information below explains how each of these media can be used.

Base Publications

Base publications can be used to place short news items or announcements, as well as longer feature stories on successful activities or participants. Types of base publications include:

- Base newspaper.
- FSC newsletter.
- Ombudsman newsletter.
- Newsletters of other Navy activities/service providers.
- POD notices.
- In-house newsletters or other communications for different commands.

Select the publications based on your market research (i.e., the publications your target audience is most likely to read). Here are some tips on using base publications for marketing:

- Work with the base PAO. This person is a wonderful resource for suggesting other publications or for helping you with questions about appropriate style and format.

Base Publications (Continued)

- Contact publishing personnel for each of these publications to find out their requirements for length, style, deadlines, etc.

- Maintain ongoing relationships with publishing personnel. Send regular press releases featuring the CDRC, its successes, and other related information. Include your name and phone number in case the publication wants more information.

- Whenever possible, tie your press releases to events occurring nationally (e.g., the increasing popularity of the Internet) or Navy-wide (e.g., recent downsizing). Your press releases are more likely to be printed if they are tied to larger events.

- Don’t forget about the POD. Write short tips and facts that relate to the CDRC. Keep them upbeat for greater appeal.

Community Publications

Community publications reach a broader audience than base publications. They include not only Navy members, but also potential resources (e.g., other service providers) as well. Here are a few examples of community publications:

- City and county newspapers (feature, classified, and business sections).
- Local trade papers.
- Community association newsletters.

Because these publications reach a broader audience, it’s often more difficult to successfully place items. In order to be published, your story has to have relevance for the whole community, not just the Navy installation. Always try to tie information about the CDRC to what’s going on in the local area. Here are some topics that may have relevance to a larger community:

- People finding second careers or beginning their own businesses.
- Job search techniques for women trying to reenter the market.
- Consumer tips; how to avoid being ripped off.
- Productive ways to manage stress.

As with base publications, it’s important to build and maintain relationships with key personnel for each publication. You can work with them to find out their publication specifications; however, remember that only the PAO is authorized to actually send out press releases. In the area of community publications, you must coordinate your efforts with the PAO.

Community Publications (Continued)

Here are some other tips for building and maintaining relationships:

- personally invite key personnel to attend events.
- Place community publications on your press release mailing list. Mail them press releases regularly and follow up later by phone. Offer to put their material in your publications, if relevant.
- Make sure reporters know you're available for an interview. One way to do this is to call them to offer an interview after you've sent a release on a hot item.

Developing an ongoing relationship with community publications is an investment of time. You'll have to evaluate whether that investment is cost-effective, based on how much the CDRC needs to target audiences in the local community.

Direct Mail

Another type of print media is direct mail. Send these mailings directly to your target audience to announce upcoming events, program successes, and any other news related to the CDRC. This technique is especially useful for reaching spouses in isolated areas. Here are some tips for using direct mail:

- Maintain an updated, computerized direct mailing list of target audience members.
- Send direct mail regularly, at least quarterly.
- Match the style and tone of the mailing to your target audience's likes and needs.
- In general, direct mail should be two pages or less, presented in an easy-to-read format, and personally signed.

Other Print Media

Other print media, such as posters, fliers, or brochures, can also be distributed to target audience members. Posters are often used to raise awareness about the nature of the CDRC, while fliers and brochures offer more details about the services offered. Here are some guidelines for print media:

Other Print Media (Continued)

- Keep the materials short, easy-to-read, and visually appealing.
- If your area has a lot of spouses who speak another language, you may want to ask a spouse who speaks English and the second language to help you draft print media in this language as well.
- Distribute materials wherever Navy members and families tend to frequent, such as commands, clinic waiting rooms, information racks at Bachelor Officers Quarters/Bachelor Enlisted Quarters (BOQ/BEQ), Housing or Personnel Support Detachment (PSD) barracks, laundry rooms, commissaries, exchanges, hair care places, and childcare centers.

Audiovisual Media

Audiovisual media can include:

- Radio
- Audiotape
- Slides
- Videotape
- Television
- Multimedia, including materials on the computer and communication via the Internet

Generally, it's much more expensive to develop quality audiovisual materials, and they're usually harder to distribute effectively. You'll need to weigh any marketing benefits against the cost.

The following pages focus on using radio, television, and video. Remember, you're representing the Navy to the public when you use either radio or television, so you must work with the PAO and get his/her approval first.

Radio

Radio is probably one of the least expensive audiovisual formats. You can write public service announcements (PSAs) that advertise the CDRC's services. If your base has its own radio station, it's likely that they will be willing to record and play your PSA. You may even be able to participate in any radio news or talk show programs they have.

Radio (Continued)

However, if you're trying to publicize the CDRC on a local community radio station, you face the same issues as with community publications. Your PSA or topic for a talk show has to be of interest to the whole community. Again, you must work with your PAO on this.

Also be aware that running PSAs is a public service, bringing in no revenue for the station. Because of that, stations tend to run PSAs mostly during the early morning hours. Given all that, here are some tips for using radio:

- Work with the base or local community station to find out their requirements on length and format for PSAs. Develop a simple, concise script based on these requirements.

- Find out from local radio stations if their personnel will record the message on the premises. If not, find a staff member or volunteer with a clear, pleasant speaking voice and locate a local recording studio to do the job. (It doesn't hurt to ask if they'll do it pro bono, but certainly don't count on it.)

- Make copies of your tapes and send them to key staff people at the local stations.

- For tips on participating in radio news programs or talk shows, see the information that follows on television.

Television

PSAs can also be produced on film or video to run on shipboard closed circuit television (CCTV) or community television stations. However, the costs of producing a quality PSA are quite high, and again, distribution could be a problem. Consider that CCTV only reaches shipboard sailors. And if you create a PSA for local television, it has to be of interest and relevance to the whole local community; otherwise, the station will probably not run it. Even if a local station agrees to do it, television stations, like radio stations, usually broadcast PSAs in the early morning hours. For tips on producing your own PSA, see the section on video on the following page.

Another marketing option is to participate in local television news programs or talk shows. When you appear as a spokesperson for the CDRC or as a subject-matter expert, you raise awareness about the CDRC and build its credibility.

Television (Continued)

Here are some tips for using television:

- Send your business card to local talk show producers, along with a letter describing several interesting topics on which you can speak. Again, make the topics relevant to the whole community, or tie them in to related recent news items. Follow up with a personal call.

- Make sure talk show producers are on the press release mailing list.

- Establish relationships with local television reporters whose beat might include issues related to the CDRC. Do this by sending them a letter and business card explaining the CDRC, your areas of expertise, and suggested story ideas.

- Whenever something new, interesting, or successful happens with community-wide interest, contact local television reporters with story ideas.

As with radio, pursuing these ongoing relationships requires an investment of time.

Video

Another type of audiovisual media is video, created specifically for the CDRC and distributed on base. Again, the costs for producing a quality presentation are fairly high, and you should consider this medium only if the product has multiple uses. For example, a 5- to 10-minute video about the CDRC and its services could be used in briefings, indoctrination (INDOC) presentations, General Navy Training (GNT), or for continuous loop showings at commissaries, exchanges, and clinic waiting rooms. Here are some tips for producing your own video:

- Be sure to have a definite goal in mind when writing the script (or contracting someone else to write it). Who is the audience? And what do you want them to do or feel after seeing the video?

- Locate someone with media production experience. Writing a script, shooting the footage, and editing the final program all require specialized skills and equipment. Resources for finding the right person or company include your customer list, the PAO, the A/V person at your base, or community advertising agencies. In addition, local television stations and colleges with communications programs often offer production services.

Video (Continued)

- Be sure the production company you choose is asking you the right questions, such as who the audience is, what your goal for the video is, and how you plan to use the finished program. Ask to see samples of their work. You want to be sure you're going to get a quality product.

- If your video calls for using "real-life" people, be sure to get appropriate clearances from the individuals involved or from their commands.

- All of these guidelines also apply if you're producing a slide show with an accompanying audiotape or multimedia presentations for the computer.

Promotions

Promotions are a marketing tool that increase the program's visibility among its target audiences. Ideas for different promotions include:

- Special events
- Giveaways
- Incentive programs

Special Events

Special events bring in people for a learning experience, while at the same time enhancing the CDRC's image. Ideas for special events include open houses, sponsored picnics, or collaborative activities with other Navy programs and services. Here are some tips for developing special event programs:

- Create events that will involve the whole family in order to increase attendance.

- Publicize the event with press releases and inform local radio and TV stations (if the event has relevance to the local community).

- Make sure you have ample materials to distribute.

- Defray labor and expenses by cosponsoring the event, when possible, with other activity and service providers.

Giveaways

Giveaways are free items distributed to target audience members that will remind them of the CDRC. They can be given away at special events or during personal networking. These items can be emblazoned with the name (Career Development and Resource Center), phone number, and other pertinent information (e.g., hours of operation and/or a short tag line explaining the purpose of the CDRC). Ideas for giveaway items include:

- Pencils/note pads
- T-shirts
- Shopping bags distributed through the commissary and exchange
- Refrigerator magnets
- Coffee mugs

Depending upon your FSC, you may or may not be able to produce giveaways. Check with the FSC Director for guidance on this issue.

Incentive Programs

Incentive programs offer something to target audience members in exchange for their attendance at a CDRC service or event. Incentives raise awareness about the CDRC and may increase its attractiveness to potential customers. Incentives are usually offered for a limited time and may be designed to appeal to each target audience. They must be publicized in order to be effective. Ideas for incentives include:

- A reception with refreshments after an event.
- Distribution of coupons to be used elsewhere on the base.
- Customers bringing their friends to a CDRC event in exchange for giveaways.

So far we have covered the three basic steps to effective marketing:

- Conducting market research
- Developing a marketing plan
- Implementing the marketing plan

The next part of the desk guide covers quality assurance and evaluation in marketing.

QUALITY ASSURANCE AND EVALUATION

This part of the desk guide discusses how to ensure quality in your marketing and how to evaluate marketing for its effectiveness.

Quality Assurance

Quality assurance is more than just evaluating your marketing results; it's striving for quality in every part of the marketing process. As you're going through the steps of conducting your market research, developing your plan, and implementing it, you should be asking yourself whether everything is being done correctly.

The following factors come into play when you're trying to ensure quality:

- Product standards
- Timeliness
- Cost in dollars and time

Let's look at some examples of quality assurance. For instance, let's say you're developing a marketing plan. Quality assurance means making sure the market research and data analysis are accurate (see ***pages VII-13*** and ***VII-14*** in this section of the desk guide). You would also want to take steps to make sure the plan was completed on time, according to schedule.

Or, let's use developing a survey as an example. Quality assurance means that you act to ensure standards. In other words, there are no mistakes in your survey. It asks the right questions; there are no typographical errors; and people can understand it.

Evaluating Marketing Effectiveness

In addition to ensuring quality, it's also important to measure the effectiveness of your marketing efforts. Effectiveness can be measured by whether or not you meet your marketing goals.

For example, let's say one of your marketing goals is to increase command referrals by 10 percent over the next 6 months. First of all, you have to know what your current command referrals **are**, as a starting point for comparison. Then you have to devise a way of tracking the number of command referrals over the next 6 months. Your tracking method might be a form your customers fill out when they are ready to leave the FSC that includes the question: "How did you hear about the CDRC?" "Command referral" can be one of several possible responses. This question can easily be incorporated into any other evaluation form you're using to measure customer satisfaction.

Evaluating Marketing Effectiveness (Continued)

The following is a sample question that can be used in a survey to get data about how many command referrals are being made.

5. Where did you find out about the CDRC? (Please check one.)

- ☐ Command referral
- ☐ Base newspaper
- ☐ FSC newsletter
- ☐ Word of mouth
- ☐ Other (please explain)

____

____

If you track the number of command referrals you receive, and they increase by at least 10 percent over 6 months, then the marketing methods you used to achieve that goal were effective. You should be able to evaluate all of your marketing efforts in terms of whether you were able to meet the overall marketing objective. (Keep in mind that if you can't measure or track your results, there's something wrong with the objective.)

Review ***pages II-24*** to ***II-27*** in Section II, Program Planning, for more information about setting goals and objectives.

SUMMARY

This section of the desk guide presented the three tasks involved in effective marketing:

- Organization of resources
- Implementation of marketing
- Quality assurance and evaluation

CAREER DEVELOPMENT AND RESOURCE CENTER (CDRC)

APPENDIX

January 1998

TABLE OF CONTENTS

Page

SAMPLE NEEDS ASSESSMENT SURVEY

1. You are: ☐ Male ☐ Female

2. Mark the range below which best describes your age:

   ☐ 20 or younger ☐ 21 - 30 ☐ 31 - 40 ☐ 41 - 50
   ☐ 51 - 60 ☐ 61 - 70 ☐ 71 or older

3. What is the highest level of education you have completed?

   ☐ Less than high school (no diploma or GED) ☐ High school (diploma or GED)
   ☐ Some college but no degree ☐ Technical/vocational degree (e.g., technician)
   ☐ College graduate ☐ Post-graduate study or degree
   ☐ Associate's degree

4. What is your current marital status?

   ☐ Married ☐ Separated/filing for divorce ☐ Divorced/widowed ☐ Never married

5. Do you have children? ☐ Yes ☐ No If so, how many? ___________

6. What is your current association with the military?

   ☐ Active duty Navy ☐ Civilian spouse ☐ Self and spouse are active duty military

7. What is your or your military spouse's pay grade? Self _________ Spouse _________

8. What is the date you or your sponsor entered the military? ______________________

9. What is your or your sponsor's date of separation/retirement? ______________________

10. How long have you been assigned to this area?

    ☐ Less than 1 month ☐ 1 - 3 months ☐ 4 - 11 months
    ☐ 12 - 24 months ☐ 25 - 36 months ☐ More than 36 months

11. Where do you live now?

    ☐ On base, barracks ☐ On base, Government housing ☐ Off base, shared rental
    ☐ Off base, rent ☐ Off base, Government leased housing ☐ Off base, own
    ☐ Temporary lodgings ☐ On-board ship

12. How far do you live from base?

    ☐ On base ☐ Less than 15 minutes away
    ☐ 15 - 30 minutes away ☐ More than 30 minutes away

SAMPLE NEEDS ASSESSMENT SURVEY (Continued)

13. How often do you or your family use the CDRC?

☐ I/we have never used the CDRC ☐ One time only ☐ About once a year
☐ 2 - 3 times a year ☐ Once a month ☐ Once a week

14. Did any of the following barriers affect your decision to use/not use the CDRC? (Mark all that apply.)

☐ CDRC doesn't meet my needs.
☐ Not aware of services.
☐ Quality of services is poor.
☐ Inconvenient hours of operation.
☐ Inadequate parking.
☐ Lack of transportation.
☐ Not accessible for the disabled.
☐ Lack of child care.
☐ Not interested in services.
☐ Did not think information remained confidential.
☐ Inconvenient location.
☐ Waiting time too long.
☐ Don't want to be seen entering building.
☐ Quality of equipment/furnishings is poor.
☐ Expertise/attitude of program staff is poor.
☐ Prefer off-base services.

15. Did you find the CDRC's services useful?

☐ Very useful ☐ Useful ☐ Not very useful ☐ Not useful at all

16. How satisfied are you with the overall quality of the CDRC?

☐ Very satisfied ☐ Satisfied ☐ Dissatisfied ☐ Very dissatisfied ☐ Never used

17. The CDRC offers the services listed below. Please circle the number that indicates the importance of each service to you.

		Unimportant	Neither Important nor Unimportant	Important
a.	Preseparation counseling	1	2	3
b.	Employment assistance	1	2	3
c.	Relocation assistance	1	2	3

18. On the lines provided, please list any changes you would like to see in the CDRC.

SAMPLE INTERVIEW QUESTIONS

1. The purpose of the CDRC is ____. How well does the CDRC accomplish its purpose?

2. Do you refer service members (or their families) to the CDRC? Why or why not?

3. What issues could the CDRC help the command address better?

4. The CDRC offers the services listed below. How would you prioritize these services?

   - Preseparation counseling
   - Employment assistance
   - Relocation assistance

5. What changes, if any, do you foresee that might affect either the services the CDRC needs to offer or the way in which the CDRC provides these services?

SAMPLE ACTION PLAN TEMPLATE

Goal:

Objective:

Action Step	Description	Who's Responsible	Date	
			Start	End
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

How Measured:

SAMPLE SEGMENT OF AN ACTION PLAN

Goal: Improve customer service.

Objective: Conduct training in customer service for all program staff over the next 2 months.

Action Step	**Description**	**Who's Responsible**	**Date**	
			Start	**End**
1	Personal effort to improve attitude (e.g., tone of voice, phone manner, flexibility).	Joan Smith	11/6/9X	12/6/9X
2	Review updated Standard Operating Procedures weekly with program staff.	Tom Brown	11/6/9X	—
3	View customer service video (as a group or separately).	Tina Longhorn	11/13/9X	12/31/9X
4	Attend communication classes.	Leslie Jones	11/6/9X	1/15/9X
5	Improve computer skills.	Tom Brown	11/13/9X	1/15/9X
6	Change the phone log to an information and referral contacts log.	Joan Smith	11/13/9X	11/20/9X
7				

How Measured:

SAMPLE SEGMENT OF AN ACTION PLAN (Continued)

Goal: Improve use of technology for the CDRC (or the FSC).

Objective: Acquire and/or upgrade hardware/software for all program-designated computers by end of this quarter.

Action Step	Description	Who's Responsible	Date Start	Date End
1	Research newly released software packages.	Pat Tobler	1/8/9X	1/22/9X
2	Discuss hardware setup for program with an expert.	Pat Tobler	1/22/9X	1/29/9X
3	Decide on hardware system/configuration and software packages.	Bobby Sanchez	2/5/9X	2/9/9X
4	Schedule and oversee the installation of new equipment and/or redesign the current system with upgraded equipment.	Bobby Sanchez	2/12/9X	3/4/9X
5				
6				
7				

How Measured:

TRANSITION ASSISTANCE PROGRAM ELIGIBILITY

If You Are . . .	And You Have . . .	Then You Are Eligible for . . . Preseparation counseling	Individual Transition Plan (Note # 1)	Career change counseling (Note # 1)	Verification of Military Experience and Training, DD Form 2586, (Note # 6)	Application for the Evaluation of Military Learning Experiences, DD Form 295	TAP/DTAP workshop (Note # 1)	DORS (Note # 1)	TBB (Note # 1)	PACS registry (Note # 1)	Other employment assistance (Note # 1)	One-time NAF hiring preference (Note # 1)	Relocation assistance (Note # 1)	Financial planning assistance (Note # 1)	Extension in DODDS (Note # 3)	MWR privileges (Note # 1)	Unemployment compensation (Note # 1)	America s Job Bank (Note # 1)	Veteran s Benefits	JTPA programs	State-of-residence veterans programs
Voluntarily separating	0-19 year of service	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No	Note #4	Note #5	Yes	Yes	Note #5	Note #5
Accepting voluntary separation incentive or special separation benefit	6-19 years of service	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Note #3	Note #4	Note #5	Yes	Yes	Note #5	Note #5
Being involuntarily separated under other than adverse conditions	0-19 years of service	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Note #3	Note #4	Note #5	Yes	Yes	Note #5	Note #5
Retiring	15 or more years of service	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Note #2	Yes	No	Yes	Yes	No	Yes	Note #5	Yes	Yes	Note #5	Note #5
Separated due to medical condition (less than 30%)	0-19 years of service	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Note #3	Yes	Note #5	Yes	Yes	Note #5	Note #5
Retired due to medical condition	N/A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No	Yes	Note #5	Yes	Yes	Note #5	Note #5

Notes:

1. Applies to service member s spouse, as appropriate.
2. Registration for public and community service is mandated by Section 4403 of Public law 102-484, The National Defense Authorization Act for Fiscal Year 1993, for service members retiring with more than 15 years but fewer than 20 years of service.
3. Continued enrollment in a DODDS overseas school shall be on a space-available basis providing the student completed the 11th grade prior to the service member s separation and subject to the Status of Forces Agreement with the host country. Retiring service members under the action of a Selective Early Retirement Board are also eligible if they meet these criteria.
4. Service members, who upon separation, will be entitled to an Armed Forces of the United States Geneva Convention Identification Card (Reserve), DD Form 2, and/or a Department of Defense Guard and Reserve Family Member Identification Care, DD Form 1173, shall be permitted to use revenue-generating (for example, clubs, bowling centers, golf courses) morale, welfare and recreation facilities.
5. Eligibility requirements vary. Contact your State or local employment or veterans office for details.
6. Service members must complete a minimum of 180 consecutive days of active duty immediately prior to separation.

TRANSITION ASSISTANCE PROGRAM ELIGIBILITY

Then You Are Eligible for . . .

If You Are . . .	**And You Have . . .**	Household goods storage	Home of selection move	Home of record move	180-day extension in military family housing (Note # 11)	Commissary & exchange privileges for self and family	Montgomery GI Bill enrollment or VEAP conversion	Teacher and teacher aide certification (Note # 4)	Medical and dental care for self and family (Note # 1)	Separation pay	Retired pay	Guard and Reserve opportunities counseling and priority placement	Continued health insurance, including preexisting conditions coverage for self and family	Disability separation pay	Excess leave (Note # 8)	Permissive TDY/TAD: Transition and househunting stationed overseas (Note # 8)	Permissive TDY/TAD: Transition and househunting stationed in CONUS (Notes # 8 and # 9)
Voluntarily separating	0-19 years of service	6 mos.	No	Yes	No	No	No	Yes	No	No	No	Yes	18 mos.	No	No	N/A	N/A
Accepting Voluntary Separation Incentive or Special Separation Benefit	6-19 years of service	1 year	Yes	N/A	Note #2	2 years	Note #3	Yes	120 days	Yes	No	Yes	18 mos.	No	30 days	Up to 30 days	Up to 20 days
Being involuntarily separated under other than adverse conditions	Fewer than 6 years of service	1 year	Yes	N/A	Note #2	2 years	Note #3	Yes	60 days	No	No	Yes	18 mos.	No	30 days	Up to 30 days	Up to 20 days
	6-19 years of service	1 year	Yes	N/A	Note #2	2 years	Note #3		120 days	Note #6	No	Yes	18 mos.	No	30 days	Up to 30 days	Up to 20 days
Retiring	15 or more years of service	1 year	Yes	N/A	No	2 years	No	Yes	Yes	No	Yes	No	Note #7	No	No	Up to 30 days	Up to 20 days
Separated due to medical condition (less than 30%)	0-19 years of service	1 year	Yes	N/A	Note #2	2 years	Note #3	Yes	Note #5	No	No	No	18 mos.	Yes	30 days	Up to 30 days	Up to 20 days
Retired due to medical condition	N/A	1 year	Yes	N/A	No	Note #10	No	Yes	Yes	No	Yes	No	No	No	No	Up to 30 days	Up to 20 days

Notes:

1. Participation in the TRICARE Family Member Dental Plan terminates the last day of the month of active service. It is not a transition benefit. Extended dental care is on a space-available basis at a military treatment facility. Note that, for dental care, the 60 or 120 days listed in this column only refer to care at base dental clinics. Enrollment in the Family member Dental Plan ceases on the month of separation, provided dental premiums are deducted for that month s coverage.
2. Space available. Rent is charged based on BAQ/VHA/OHA rate. Entitlement s subject to Status of Forces Agreement (SOFA) restrictions overseas. Retiring service members under the action of a Selective Early Retirement Board (SERB) are also eligible if they meet these criteria.
3. Service member must pay $1,200 and have been honorably discharged.
4. Service member must have completed a bachelors degree to be eligible for teacher certification. Service member must have completed an associate s degree to be eligible for teacher aide certification.
5. Sixty days care for service member and family who served fewer than 6 years of service: 120 days for service member and family who served 6-19 years of service.
6. Service member must have been involuntarily discharged under other than adverse conditions.
7. Certain dependents of retired service members may be eligible. See the installation Health Benefits Advisor for details.
8. Service members are authorized to request excess leave or permissive TDY/TAD, but not both.
9. Up to 30 days for those members who are domicilliaries before entering active duty and continue to be domiciliaries of States, possessions, or territories of the U.S. located outside the continental U.S. (OCONUS), including domiciliaries of foreign countries, and are stationed at a location other than the State, possession, territory, or country of their domicile, contingent upon commander s approval and mission requirements.
10. The commissary and exchange regulations extend unlimited privileges to a member entitled to retired pay. The same regulations offer unlimited privileges to an honorably discharged veteran with a 100% service-connected disability. Members entitled to retired pay who are also rated by the VA as 100% disabled, remain eligible for the blue ID card even if they waive retired pay to receive VA compensation.

CONDITIONS AND PROCEDURES FOR THE ACCEPTANCE OF VOLUNTEER SERVICES FROM MILITARY SPOUSES

(Taken from the Department of the Navy Memorandum)

Conditions for Acceptance of Volunteer Service:

1. Volunteer services, in any capacity, may be accepted from spouses of active duty military members referred by Family Service Centers when:

    a. Experience gained during such volunteer service will directly enhance future employability.

    b. Services are not used as an alternative to paid employment for either the volunteer or any other person.

    c. Services under this authority do not exceed a total of 6 months in any calendar year.

    d. An agreement is executed between the spouse providing the services and the activity when the services are to be provided (see agreement in Attachment A).

2. Volunteer services do not confer any type of civil service status. Volunteers shall not be considered Federal employees for any purpose by reason of such service except:

    a. For purposes of Chapter 81 of Title 5, relating to compensation for work-related injuries

    b. For purposes of Chapter 171 of Title 28, relating to tort claims.

3. Volunteers are not entitled to benefits or pay.

4. Volunteer service does not meet the requirement for a period of employment for the purpose of eligibility for non-competitive appointment provided by Executive Order 12362 for certain former overseas employees.

5. The Department of the Navy is an Equal Employment Opportunity employer. All selections and assignments of volunteers will be made in full accordance with EEO principles.

CONDITIONS AND PROCEDURES FOR THE ACCEPTANCE OF VOLUNTEER SERVICES FROM MILITARY SPOUSES

(Taken from the Department of the Navy Memorandum)

Procedures for Acceptance of Volunteer Service:

1. An Official Personnel Folder (OPF) will be established for each volunteer. Normal procedures for establishing and disposing of OPFs should be followed.

2. Standard Form 50 (SF-50) will be used to document all volunteer service under this provision. Procedures similar to those in FPM 308-7 (covering Student Volunteer Service) should be followed. Substitute the following remark for the reference to 5 USC 3111 on the SF-50 samples in FPM 308-C: "Under 10 USC 1588, a person providing volunteer service for a family support program."

3. An activity record for each volunteer must be maintained. It should include:

   a. A summary of the volunteer's education and experience (an SF-171, Application for Federal Employment, an equivalent local form, or a resume may be used).

   b. The purpose and location of the volunteer service.

   c. The total period of volunteer service.

4. Activity records should be maintained for 2 years after the end of the latest period of volunteer service. Records should be available for review during Personnel Management Evaluations and for later summarization to facilitate review of the efficacy of the use of such volunteers.

ATTACHMENT A: VOLUNTEER SERVICE AGREEMENT

(Taken from the Department of the Navy Memorandum)

Volunteer service agreement between ____

and ____.

Statement of Understanding. This is an agreement for the provision of volunteer services under the provisions of 10 USC 1588. In support of a family support program relating to enhanced employability of spouses of active duty military members, volunteer services as noted below will be provided.

The following conditions apply:

1. Volunteer service is for the purpose of providing work experience designed to develop skills which will enhance the opportunities for gaining paid employment.

2. Volunteer service is entirely without paid compensation.

3. Volunteers are not considered Federal employees for any purpose other than Tort Claims provisions and purposes relating to compensation for work-related injuries.

4. Volunteer service confers neither civil service status nor any entitlement to future employment with any Federal organization.

5. Volunteer service may be terminated at any time at the discretion of the host activity.

6. Volunteer service may not be used as an alternative to paid employment for the volunteer or any other person.

7. Volunteer service may not exceed a total of 6 months in any calendar year.

8. The volunteer service will be performed at ______________________________________

   and will involve work experiences in such areas as_________________________________

   ____.

   Service is expected to comprise ________________ hours per ________________ and is

   expected to last for the period _________________________________.

_________________________________	_________________________________
(Volunteer)	(Activity Representative)
__________ (Date)	__________ (Date)

HOW TO APPLY FOR FEDERAL EMPLOYMENT

Although the Federal Government does not require a standard application form, certain information is required to evaluate applicant qualifications and to determine if the applicant meets legal requirements for Federal employment. If applicants do not provide all required information, they may lose consideration for a job. The information is a list of guidelines for Federal employment applicants.

What to submit:

1. A current copy of one of the following. (All applicants):

   - Application for Federal Employment (SF-171).
   - Optional Application for Federal Employment (OF-612).
   - Resume or personal application form that includes all the required information (see Attachment A on page A-13).

2. A copy of your most recent final rating under your appraisal system. (All applicants.)

3. A description of your accomplishments that demonstrate your competence in the knowledge, skills, and abilities (KSAs) on plain paper. Any experience, awards, and/or specific training and educational courses that relate to the KSAs should also be described. Experience may be as an employee or volunteer, paid or unpaid. It is necessary that you state specifically what you have done when demonstrating your competence in KSAs. (Optional.)

4. An Applicant Background Survey. (Optional.)

5. A Certificate of Release or Discharge from Active Duty (DD-214), if claiming a 5-Point Veterans' Preference, or Application for 10-Point Veterans' Preference, if claiming a 10-Point Preference, and the documentary proof needed to prove your claim. (Non-status applicants, if applicable.)

6. A copy of your most recent Notification of Personnel Action (SF-50) showing the highest grade achieved or competitive status for reinstatement eligibles. (All applicants, if applicable.)

HOW TO APPLY FOR FEDERAL EMPLOYMENT (Continued)

Additional information:

Before hiring, you will be asked to complete a Declaration for Federal Employment in order to determine your suitability for Federal employment to authorize a background investigation and to certify the accuracy of all the information in your application. If you make a false statement in any part of your application, you may not be hired, you may be fired after you begin work, or you may be fined or jailed.

Applicants must meet time-in-grade, time after competitive appointment, and/or qualifications requirements within 30 days of the closing date of the vacancy announcement.

If you are a male over age 18, you must have registered with the Selective Service System (or have an exemption) to be eligible for a Federal job.

The law prohibits public officials from appointing, promoting, or recommending their relatives.

Federal annuitants (military and civilian) may have their salaries or annuities reduced. All employees must pay any valid delinquent debts or the agency may garnish their salaries.

All status applicants who wish to be considered under both merit promotion and competitive procedures must submit two complete applications.

Application forms are subject to the provisions of the Privacy Act. Selection for a position will be based solely on merit, without discrimination for nonmerit reasons such as race, color, religion, sex, national origin, politics, marital status, sexual orientation, physical or mental handicap, age, or membership or nonmembership in an employee organization.

HOW TO APPLY FOR FEDERAL EMPLOYMENT
ATTACHMENT A

Your resume or personal application form must contain:

1. Job Information:
   - Vacancy announcement number, title, and grade(s) of the job for which you are applying.
2. Personal Information:
   - Full name and mailing address (including Zip code).
   - Social Security number.
   - Day and evening phone numbers (with area codes).
   - Country of citizenship (most Federal jobs require U.S. citizenship).
   - Veterans' preference.
   - Reinstatement eligibility (attach a copy of your SF-50 for proof of your career or career-conditional status, if applicable).
   - Highest Federal civilian grade held (also give job series and title).
3. Education:
   - High school — name, city, State, and Zip code; date of diploma or GED.
   - College/university — name, city, State, and Zip code; majors; type and year of any degrees received; if no degree, show any credits earned, indicating semester or quarter hours; a copy of your college transcripts (if requested in the job vacancy announcement).
4. Work Experience — Give the following information for your paid and nonpaid work experience related to the job for which you are applying:
   - Job title (include series and grade if Federal job)
   - Employer's name and address
   - Supervisor's name and phone number
   - Starting and ending dates (months and year)
   - Hours per week
   - Salary
   - Duties and accomplishments
5. Other Qualifications:
   - Job-related training courses (title and year).
   - Job-related skills (e.g., other languages, typing speed, computer software/ hardware, tools, machinery, etc.).
   - Job-related certificates and licenses (current only).
   - Job-related honors, awards, special accomplishments (e.g., publications, memberships in professional or honor societies, leadership activities, public speaking, and performance awards).

OPERATION TRANSITION — DEPARTMENT OF DEFENSE OUTPLACEMENT REFERRAL SYSTEM (DORS)/ PUBLIC AND COMMUNITY SERVICE (PACS) INDIVIDUAL APPLICATION

This application is shown in its entirety on the following pages, A-16 through A-18.

OPERATION TRANSITION - DEPARTMENT OF DEFENSE OUTPLACEMENT REFERRAL SYSTEM (DORS)/ PUBLIC AND COMMUNITY SERVICE (PACS)
INDIVIDUAL APPLICATION
DETAILED INSTRUCTIONS

SECTION I - PERSONAL INFORMATION

If you are a Service member, complete Items 1 through 13 in their entirety. You do not need to fill out Item 14. If you are a spouse, you must complete all items on the form. All applicants must sign and date the completed form.

Item 1. Name. Print/type your name, last name first.

Item 2. SSN. Enter your Social Security Number.

Item 3. Date Available for Work. Enter the date you will be available for work as year, month, day *(YYYYMMDD)*. Availability should not be beyond 6 months from the current date with the exception of those registering with PACS as required by law for early retirement.

Item 4. Filing Status. Place an X in the first box that applies. If military, place a second X in the box indicating the branch of Service you are in.

Item 5. Citizenship. If you are a U.S. citizen, X the YES box. If not, X the NO box.

Item 6. Registry Selection. Place an X in the program you wish to register for. Selecting PACS only will result in your resume only being referred to Public and Community Service employers.

Item 7. Address and Telephone Number. Print/type the address and telephone number where you can be contacted during the next three to six months and an alternate U.S. telephone number where messages can always be left for you.

Item 8. Regional Work Preferences. Refer to the regional preference list below, and enter up to four two-digit codes for the geographical areas in which you are seeking employment.

REGION 00
Only the specific states and/ or cities selected in Item 9.

REGION 01
Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

REGION 02
Delaware
New Jersey
New York
Includes NYC metro area
Pennsylvania

REGION 03
District of Columbia
Includes DC metro area
Maryland
North Carolina
South Carolina
Virginia
West Virginia

REGION 04
Alabama
Florida
Georgia
Mississippi
Puerto Rico
Tennessee
Virgin Islands

REGION 05
Indiana
Kentucky
Michigan
Ohio

REGION 06
Iowa
Minnesota
Montana
North Dakota
South Dakota
Wisconsin

REGION 07
Illinois
Kansas
Missouri
Nebraska

REGION 08
Arkansas
Louisiana
Oklahoma
Texas

REGION 09
Arizona
Colorado
Idaho
Nevada
New Mexico
Utah
Wyoming

REGION 10
California
Includes LA metro area
Oregon
Washington

REGION 11
Alaska

REGION 12
American Samoa
Federated States of Micronesia
Guam
Hawaii
Marshall Islands
Northern Mariana Islands

REGION 14
Outside the U.S.A.

Item 9. Specific Work Preferences. Refer to the list below and enter the two-letter abbreviation for up to five states or U.S. Possessions in which you are seeking employment. If you desire to be referred only within 50 miles of a city in that state, print/type the name of the largest city within commuting distance of where you want to work. These states and cities do not have to be in the region chosen in Item 8.

STATE	CODE	STATE	CODE	STATE	CODE
Alabama	AL	California	CA	Federated States of Micronesia	FM
Alaska	AK	Colorado	CO	Florida	FL
American Samoa	AS	Connecticut	CT	Georgia	GA
Arizona	AZ	Delaware	DE	Guam	GU
Arkansas	AR	District of Columbia	DC		

Item 9. Specific Work Preferences *(Continued)*

STATE	CODE	STATE	CODE	STATE	CODE
Hawaii	HI	Missouri	MO	Pennsylvania	PA
Idaho	ID	Montana	MT	Puerto Rico	PR
Illinois	IL	Nebraska	NE	Rhode Island	RI
Indiana	IN	Nevada	NV	South Carolina	SC
Iowa	IA	New Hampshire	NH	South Dakota	SD
Kansas	KS	New Jersey	NJ	Tennessee	TN
Kentucky	KY	New Mexico	NM	Texas	TX
Louisiana	LA	New York	NY	Utah	UT
Maine	ME	North Carolina	NC	Vermont	VT
Marshall Islands	MH	North Dakota	ND	Virgin Islands	VI
Maryland	MD	Northern Mariana Islands	MP	Virginia	VA
Massachusetts	MA	Ohio	OH	Washington	WA
Michigan	MI	Oklahoma	OK	West Virginia	WV
Minnesota	MN	Oregon	OR	Wisconsin	WI
Mississippi	MS			Wyoming	WY

Item 10. Highest Education Level Achieved. X the box which most closely matches your highest education level achieved.

Item 11. Year Achieved. Enter the year you achieved Item 10.

Item 12. Major Area of Study. Print/type the degree achieved (if applicable) and the major area of study in Item 10 (e.g., Mechanical Engineering; BA, Western Civilization; MS, Physics; etc.).

Item 13. College/University. Print/type the name of the College/University where Item 10 was obtained, if applicable.

Item 14. Sponsor Data. This item is to be completed only by the spouses of military and DoD civilians whose personnel files are not kept by the government.

a. Name. Print/type your sponsor's name, last name first.
b. SSN. Enter your sponsor's Social Security Number.

SECTION II - CAREER AREA INFORMATION

The text entered for the career area information will be printed verbatim on your resume. Carefully choose your words, grammar, and presentation format.

You may complete up to two additional career information sections resulting in two additional resumes by completing DD Form 2580C. Each Career Area Information section (Section II) will be combined with the Personal Information (Section I) to form a single resume. Each resume should represent a career that is related to the job type preference codes entered in Item 15.

Item 15. Job Type Preferences. Enter up to three codes from the Occupational Employment Statistics (OES) Codes that most closely match(es) the type of job(s) you are seeking/qualified to perform.

Item 16. Objective. Print/type your career objective. Use this space to tell a prospective employer what your employment goal is. You may leave the objective narrative blank *(resulting in the omission of the Objective portion on your resume).*

Item 17. Summary of Qualifications. Use this space to tell the prospective employer about yourself. Include the training, experience, supervisory skills, special talents, and personal abilities that make you uniquely qualified for jobs in this career area.

Item 18. Source of Experience Narrative. Place an X in the first box if you would like your resume to automatically include the primary occupation description from your most current military/civil service personnel file. Place an X in the second box if you would rather supply your own narrative in Item 19.

Item 19. Experience Narrative. Use this space to let the prospective employer know the prior experience you have in this career area. You may leave the experience narrative blank *(resulting in the omission of the Experience portion on your resume).*

DD FORM 2580, JAN 1998 **Front Cover**

OPERATION TRANSITION - DEPARTMENT OF DEFENSE OUTPLACEMENT REFERRAL SYSTEM (DORS)/PUBLIC AND COMMUNITY SERVICE (PACS) INDIVIDUAL APPLICATION

Form Approved
OMB No. 0704-0324
Expires Dec 31, 2000

The public reporting burden for this collection of information is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0324), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.

PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. RETURN COMPLETED FORM TO YOUR LOCAL MILITARY TRANSITION OFFICE.

PRIVACY ACT STATEMENT

AUTHORITY: 10 U.S.C. 136, 1143, 1143a, 1144, 2358; P.L. 101-510, 102-484 and 103-337; 31 U.S.C. 1535; and EO 9397.

PRINCIPAL PURPOSE(S): To facilitate the transition of military and civilian Defense and U.S. Coast Guard personnel, and other Federal department and agency personnel and their spouses, to private industry and public employment in the event of a downsizing of the Department of Defense, the Department of Transportation, and other Federal departments and agencies.

ROUTINE USE(S): No release of personal information for any purpose other than that noted in "Principal Purpose(s)" is authorized.

DISCLOSURE: Voluntary; however, failure to provide all requested information will result in the applicant not being included in the system.

If you are an active duty Service member, the following information will be added to your job referral form from your official military personnel records, if available: Rank, Years of Service, Most Recent Primary Occupation, and Branch of Service. Information on race, ethnic background, sex, age, marital status, and religious preference will not be released to employers. Operation Transition is an equal opportunity program. Completion of questions pertaining to the DORS program is voluntary.

SECTION I - PERSONAL INFORMATION

1. NAME *(Last, First, Middle Initial)*

2. SSN

3. DATE AVAILABLE FOR WORK *(YYYYMMDD)*

4. FILING STATUS *(X the first category that applies)*

a. MILITARY *(X one)*: ARMY / NAVY / AIR FORCE / MARINE CORPS / COAST GUARD

b. CIVIL SERVICE EMPLOYEE

c. SPOUSE OF MILITARY OR CIVIL SERVICE EMPLOYEE

5. U.S. CITIZEN? *(X one)*: YES / NO

6. REGISTRY SELECTION *(X one)*: DORS/PACS / PACS ONLY

7. ADDRESS AND TELEPHONE NUMBERS *(For the next three to six months)*

a. STREET ADDRESS *(Line 1)*

b. STREET ADDRESS *(Line 2)*

c. CITY

d. STATE OR U.S. POSSESSION

e. U.S. ZIP CODE

f. COUNTRY

g. FOREIGN ZIP CODE

h. U.S. TELEPHONE NUMBER *(Include area code)*

i. FOREIGN TELEPHONE NUMBER *(Include area code)*

j. ALTERNATE TELEPHONE NUMBER *(Include area code)*

8. REGIONAL WORK PREFERENCES *(Enter one digit per block)*

9. SPECIFIC WORK LOCATION PREFERENCES *(Nearest large town or city within commuting distance - does not have to be in the selected region)*

a. STATES OR U.S. POSSESSIONS	b. CITY *(Leave blank for State-wide consideration)*
(1)	
(2)	
(3)	
(4)	
(5)	

10. HIGHEST EDUCATION LEVEL ACHIEVED *(X one)*

a. NON-HIGH SCHOOL GRADUATE
b. HIGH SCHOOL GRADUATE OR GED
c. LESS THAN 2 YEARS OF COLLEGE
d. ASSOCIATE DEGREE OR EQUIVALENT
e. LESS THAN 4 YEARS OF COLLEGE
f. BACHELOR'S DEGREE
g. POST BACHELOR'S STUDY
h. MASTER'S DEGREE
i. POST MASTER'S STUDY
j. DOCTORATE DEGREE

11. YEAR ACHIEVED

12. MAJOR AREA OF STUDY *(If applicable)*

13. COLLEGE/UNIVERSITY *(If applicable)*

14. SPONSOR DATA *(Applicable only to spouses of military or civil service personnel)*

a. SPONSOR NAME *(Last, First, Middle Initial)*

b. SPONSOR SSN

DD FORM 2580, JAN 1998 (EG) PREVIOUS EDITION IS OBSOLETE. Designed using Perform Pro, WHS/DIOR, Jan 98

SECTION II - CAREER AREA INFORMATION

The personal information you have just completed will be combined with this career area information to form one complete resume. You may complete up to two additional career information sections resulting in two additional resumes by completing DD Form 2580C. Each resume's career information represents a career that can be related to a maximum of three job type preference codes *(e.g., for "Therapist," you might enter the codes of 32305 (Occupational Therapist), 32308 (Physical Therapist) and 32317 (Recreational Therapist).*

15. JOB TYPE PREFERENCES *(See Instructions for job codes. Enter one digit per block.)*

16. OBJECTIVE *(Optional) (State an objective. Your "objective" could describe a job title, position, or occupation that you desire.) (Example: Seeking a position with management potential in the transportation industry.)*

17. SUMMARY OF QUALIFICATIONS *(See Instructions. Limit entry to 15 lines, 75 characters per line.)*

18. SOURCE OF EXPERIENCE NARRATIVE *(X one)*

a. **USE THE PRIMARY OCCUPATION** *(i.e., MOS, AFSC, Rating, NEC, NOBC, GS, or WG)* **DESCRIPTION FROM MILITARY/CIVIL SERVICE PERSONNEL FILES.** *(Applicable to Military (except USCG officers)/Civil Service Personnel only) (Proceed to Item 20.)*

b. **SUPPLY YOUR OWN EXPERIENCE NARRATIVE IN ITEM 19 BELOW.**

19. EXPERIENCE NARRATIVE *(Limit entry to 10 lines, 75 characters per line.)*

20. PLEASE USE DD FORM 2580C IF YOU NEED TO COMPLETE ADDITIONAL RESUMES. X THIS BOX IF DD FORM 2580C IS USED.

21. AUTHORIZATION *(All applicants must read and sign)*

I hereby authorize release of the data on the DD Forms 2580 and 2580C *(if used)* to civilian agencies and/or public and private organizations for employment purposes. If I am a civil service employee or an active duty service member, I also authorize the release of data from extracts of my computerized personnel records.

a. SIGNATURE	b. DATE SIGNED *(YYYYMMDD)*

DD FORM 2580 (BACK), JAN 1998

TRANSITION ASSISTANCE PROGRAM (TAP)
WORKSHOP AGENDA

1. Personal Appraisal

1.1 Dealing With Stress
1.2 Creating a Career Catalog
1.3 Analyzing Your Skills
1.4 Determining Your Work Preferences
1.5 Analyzing Work-Related Values
1.6 Identifying Specific Strengths and Limitations Arising From Military Experience

2. Career Decisions

2.1 Identifying Goals
2.2 Assessing Personal Needs

3. Applying for the Job

3.1 Getting Started
3.2 Analyzing Want Ads and Job Announcements
3.3 Completing Application Forms
3.4 Opportunities for Federal Civil Service Employment
3.5 Researching the Company
3.6 Taking Employment Tests
3.7 Creating an Effective Resume
3.8 Writing Cover Letters

4. The Interview

4.1 Understanding the Interview Process
4.2 Preparing for the Interview
4.3 Grooming
4.4 Sharpening Listening Skills
4.5 Interpreting/Using Nonverbal Cues
4.6 Answering Questions
4.7 Responding to Unspoken Questions (Critical Factors in the Interview Process)
4.8 Asking Questions During the Interview
4.9 Putting It All Together for the Interview
4.10 Following Up After the Interview
4.11 Analyzing Why You Did Not Get the Job

TRANSITION ASSISTANCE PROGRAM (TAP)
WORKSHOP AGENDA (Continued)

5. Reviewing Job Offers

5.1 Evaluating Job Offers
5.2 Negotiating Job Offers
5.3 Communicating Your Decision to the Employer

6. Support and Assistance

6.1 Job Search Assistance
6.2 Veterans Benefits
6.3 A Veteran's Guide to Entrepreneurship

7. Department of Defense *Operation Transition*

APPENDICES:

Appendix A: Directors of Veterans' Employment and Training (USDOL)

Appendix B: State Employment Service Agencies

Appendix C: Veterans Service Organizations

Appendix D: Department of Veterans Affairs Regional Offices and Medical Centers

Appendix E: Department of Veterans Affairs Vet Centers

Appendix F: Department of Veterans Affairs Alcohol and Drug Dependence Treatment Facilities

Appendix G: Office of Personnel Management Federal Job Information/Testing Offices

Appendix H: Recommended Reading

Appendix I: Quizzes

Appendix J: Worksheets

REQUEST FOR VERIFICATION OF MILITARY EXPERIENCE AND TRAINING DOCUMENT

This form is to be used only for separating service members who have not received their Verification of Military Experience and Training (VMET) document (DD Form 2586) and are within 120 days of separating. Anyone who separated prior to 1 October 1990 is not eligible. Service members separating early under VSI, SSB, TERA, medical conditions, etc., may not receive documents automatically and should fill in this form and mail it to Navy Personnel Command (NPC-662C) at the address below. (Limit is one DD Form 2586 per member.) Request take 6-8 weeks to process.

VMET Request Form

ENSURE SPELLING OF ADDRESS AND NAME ARE CORRECT!
Please fill out form completely and legibly.

DATE OF REQUEST:____________ SSN:__ __ __-__ __-__ __ __ __

SEPARATION DATE:____________ RATE:____________________________

LAST NAME:___________________FIRST NAME:__________________MI:___

HOME MAILING ADDRESS:

STREET:____

CITY, STATE & ZIP+4:____

TELEPHONE NUMBER:____

MAIL THIS FORM TO:

NAVY PERSONNEL COMMAND
PERSONAL & FAMILY READINESS (NPC-662C)
5720 INTEGRITY DRIVE
MILLINGTON, TN 38055-6620

OR FAX TO:

COMMERCIAL (901) 874-2630/2689 OR DSN 882-2630/2689

TRANSITION COUNTDOWN

12 Months Prior to Separation	9 Months Prior to Separation	6 Months Prior to Separation	3 Months Prior to Separation
· Visit the CDRC to pick up Preseparation Guide and Individual Career Life Plan (ICLP). · Research career and education interests and geographic preferences. · Review financial status. · Include spouse/family in transition process. · Visit Relocation office to access SITES.	· Using your completed ICLP: - Consider all options - Research employers - Check out academic courses - Visit your CCC · Begin networking with family, friends, and employers. · If relocating, research new area.	· Check on Verification of Military Education and Training (VMET, DD Form 2586) with command. · Obtain TAP quota. · Identify professional/career organizations. · Research current industry trends/check TBB and AJB. · Develop resumes. · Update civilian wardrobe. · Visit State employment service.	· Fill out DORS application. · Practice interview techniques. · Ensure Preseparation Counseling Checklist (DD Form 2648) is completed and in service record (IT'S THE LAW!). · Continue informational interviews. **<u>1 Month Prior to Separation</u>** · Update DORS/resumes · Check all employment resources. · Compare military career opportunities with those in the civilian sector. · Notify the CDRC of future career decisions.

Whatever your decision may be, your local CDRC office wishes you smooth sailing!

PRESEPARATION COUNSELING CHECKLIST

(Please read Privacy Act Statement on back before completing this form.)

SECTION I. *Please indicate (by checking YES or NO) whether you or your spouses (if applicable) desire counseling for the following services and benefits. All benefits and services checked YES should be used in developing your ICLP. The following services and benefits are available to all service members, unless otherwise specified.*

	SERVICE MEMBER			SPOUSE			REFERRED TO
	YES	NO	N/A	YES	NO	N/A	(Input is optional)
1. INDIVIDUAL CAREER LIFE PLAN (ICLP)							
2. EFFECTS OF A CAREER CHANGE							
3. EMPLOYMENT ASSISTANCE							
a. DOL-sponsored Transition Assistance Program and Service-sponsored Transition Seminars/ Programs							
b. Use of DD Form 2586 (Verification of Military Experience and Training)							
c. Defense Outplacement Referral System (DORS)							
d. Public and Community Service (PACS)							
e. Transition Bulletin Board (TBB)							
f. Teacher and Teacher s Aid Placement/Certification Program							
g. Federal Employment Opportunities							
h. Hiring Preference in Non-Appropriated Fund (NAF) jobs (VSI, SSB, Eligible Involuntary Separatees)							
I. State Employment Agencies/Interstate Job Bank							
4. RELOCATION ASSISTANCE							
a. Excess leave and permissive TDY/TAD)							
b. Travel and transportation allowances							
c. Military family housing extension (VSI, SSB, Eligible Involuntary Separatees)							
d. Commissary and exchange benefits extension (VSI, SSB, Eligible Involuntary Separatees)							
e. DODDS school extension (Eligible Involuntary Separatees Only)							
5. EDUCATION/TRAINING							
a. Education benefits (Montgomery Bill, Veterans Educational Assistance Program, Vietnam-era, etc.)							
6. HEALTH AND LIVE INSURANCE							
a. 60-day or 120-day extended Military Medical and Dental benefits (VSI, SSB, Eligible)							
b. Option to purchase 18-month conversion health insurance							
c. Concurrent pre-existing condition coverage wit purchase of conversion health insurance (VSI, SSB, Eligible Involuntary Separatees)							
d. Veterans Group Life Insurance							
7. FINANCES							
a. Financial Management							
b. Separation pay (VSI, SSB, Eligible Involuntary Separatees)							
c. Unemployment compensation							
d. Other financial assistance (VA Loans, SBA Loans, and other Government grants and loans)							
8. RESERVE AFFILIATION/PRIORITY							
9. DISABLED VETERANS							
a. Disabled Transition Assistance Program (DTAP)							
b. VA Disability Benefits							

*** STATUS OF FORCES AGREEMENT LIMITATIONS APPLY FOR OVERSEAS SERVICE MEMBERS**

PRIVACY ACT STATEMENT

1. LEGAL AUTHORITY FOR REQUESTING INFORMATION FROM YOU: 5 U.S.C. Sect. 301, which allows Secretary of the Navy to make regulations for the Department of the Navy. One of those regulations, SECNAVINST 1754.1A, Department of the Navy Family Service Center Program, established the Navy Family Service Center Program.

2. PRINCIPAL PURPOSE FOR WHICH YOUR INFORMATION WILL BE USED: The information you provide will help the Family Service Center (FSC) professional staff assist you.

3. ROUTINE USES WHICH MAY BE MADE OF YOUR INFORMATION: In addition to using the information you give us for the "principle purpose" given above, your information may be used for one or more of the "routine uses" listed in the Federal Register notice for this system (including the blanket routine uses that are applicable to all Navy Privacy Act systems of records). This Federal Register Notice is available here at the FSC for you to see if you wish.

   Four of the routine uses are:

   a. Disclosure to State and local government authorities in accordance with State and local laws requiring the reporting of suspected child abuse and neglect.
   b. Disclosure to the appropriate Federal, State, or local agency charged with enforcing a law, where FSC records indicate that a violation of law may have occurred.
   c. Disclosure to certain foreign authorities in connections with international agreements, including status of forces agreements (SOFAs).
   d. Disclosure of the Department of Justice for litigation purposes.

4. OTHER DISCLOSURE OF YOUR INFORMATION: In addition to using the information you give us for the "principle purpose" and the "routine uses" given above, your information may be disclosed in certain other specific circumstances, as permitted by exceptions to the Privacy Act. These could include clearances, personnel reliability programs, law-enforcement programs, life-threatening situations, substance-abuse programs, and family abuse situations.

5. DISCLOSURE IS VOLUNTARY: You need not disclose any information to us; however, failure to provide this information may hinder or prevent the FSC staff from being able to assist you.

I have read and understand the above IMPORTANT NOTICE and Privacy Act Statement and the routine uses of the information which may be provided by me. My FSC counselor has explained the contents of the Privacy Act Statement to me.

____________________________________ ____________________

Signature Date

____________________________________ ____________________

Signature (witness) Date

INDIVIDUAL CAREER LIFE PLAN
Short-Range Career Development Plan (within 1 year)

Brief Statement Describing Your Short-Range Goal:		**Date for Completion:**
Objectives (Knowledge, skill, or ability needed to meet your goal):	**Formal Training** (Course title, location, dates):	**Alternative Training** (OJT, self-study, correspondence courses):

Signature: **Date:** **Mentor/Coach Signature:** **Date:**

Individual Growth/Wellness Plan

Measure of Progress	Review Dates
(How will I know I'm making progress toward achieving my objective?)	(When will I review my progress toward the achievement of my objective?)

Potential Obstacles or Problems	Sources of Help
(What might interfere with my taking action and achieving my objective, and how can I plan to deal with this?)	(Who or what will assist me in taking action and achieving my objective?)

INDIVIDUAL CAREER LIFE PLAN

Mid-Range Career Development Plan (8-10 years)

Brief Statement Describing Your Mid-Range Goal:		**Date for Completion:**
Objectives (Knowledge, skill, or ability needed to meet your goal):	**Formal Training** (Course title, location, dates):	**Alternative Training** (OJT, self-study, correspondence courses):

Signature: **Date:** **Mentor/Coach Signature:** **Date:**

Individual Growth/Wellness Plan

<table>
<tr><td colspan="2">

Measure of Progress
(How will I know I'm making progress toward achieving my objective?)

Review Dates
(When will I review my progress toward the achievement of my objective?)

</td></tr>
<tr><td>

Potential Obstacles or Problems
(What might interfere with my taking action and achieving my objective, and how can I plan to deal with this?)

</td><td>

Sources of Help
(Who or what will assist me in taking action and achieving my objective?)

</td></tr>
</table>

INDIVIDUAL CAREER LIFE PLAN
Long-Range Career Development Plan (18-20 years)

Brief Statement Describing Your Long-Range Goal:		**Date for Completion:**
Objectives (Knowledge, skill, or ability needed to meet your goal):	**Formal Training** (Course title, location, dates):	**Alternative Training** (OJT, self-study, correspondence courses):
Signature: **Date:**	**Mentor/Coach Signature:**	**Date:**

Individual Growth/Wellness Plan

Measure of Progress (How will I know I'm making progress toward achieving my objective?)	Review Dates (When will I review my progress toward the achievement of my objective?)

Potential Obstacles or Problems (What might interfere with my taking action and achieving my objective, and how can I plan to deal with this?)	Sources of Help (Who or what will assist me in taking action and achieving my objective?)

SAMPLE WORKSHOP EVALUATION
(For Participants)

Please help us by answering these questions about the workshop you just attended. Your answers will help our program staff to improve our workshops and to plan future workshops. Thank you very much for your help.

Date: ____________________

1. Workshop: ____

2. Please check the response you consider best for each of the following:

   A. Was the workshop interesting?
   ( ) Very much so ( ) Somewhat interesting ( ) Not very interesting ( ) Dull

   B. How useful was the workshop for you?
   ( ) Very useful ( ) Somewhat useful ( ) Not very useful ( ) No use at all

   C. How would you rate the workshop leader or teacher?
   ( ) Excellent ( ) Good ( ) Average ( ) Fair ( ) Poor

   D. How would you rate the way the workshop was planned or organized?
   ( ) Excellent ( ) Good ( ) Average ( ) Fair ( ) Poor

   E. Overall, how would you rate the workshop?
   ( ) Excellent ( ) Good ( ) Average ( ) Fair ( ) Poor

   F. How did you learn about the workshop?
   ( ) Friend ( ) Radio ( ) Poster ( ) Command Rep ( ) Publication
   ( ) Other ______________________________

3. What did you like about the workshop?

   ____

   ____

4. What did you not like about the workshop?

   ____

   ____

5. Would you recommend this workshop to others? ( ) Yes ( ) No

6. What other workshops would you like us to provide?

   ____

   ____

SAMPLE WORKSHOP EVALUATION
(For Participants) (Continued)

Comments and suggestions:

Optional

Name:

Address:

Duty Phone:

SAMPLE STANDARD OPERATING PROCEDURE (SOP)

TITLE: Exploring My Options

DATE: May 1995

REFERENCES:
(a) OPNAVINST 1900.2
(b) COMFAIRMEDINST 1740.2
(c) Public Law 101-510
(d) Public Law Instruction 101-189

ATTACHMENTS:
(1) Sample schedule
(2) Sample fliers
(3) Registration sheet
(4) Evaluations form

I. BACKGROUND AND PURPOSE:

"Exploring My Options" is a self-assessment workshop. Self-assessment is the first step in the career/work decision-making process. Self-assessment is a method for developing better awareness about who the client is and what he/she wants from his/her work and life. This workshop enables separating service members to explore career options.

II. TARGET POPULATION:

Active duty members, family members, and Department of Defense (DOD) civilians preparing to separate; clients in the process of making a career change.

III. PROCEDURES:

1. Identify the need/desire of the client for this self-assessment assistance. (You can make this identification from an intake appointment or from another workshop.)
2. Schedule the client for this workshop.
3. Offer this program quarterly or on an as-needed basis.
4. Preregistration is required to enable staff to prepare sufficient materials.

VI. CONTENT

- Icebreaker
- Introductions
- Career Planning Activities
- Theory of Career Development

***VI. CONTENT** (Continued)*

- Developing a Time Line
- Reflections Exercise
- Assessment of Preferred Work
- Environment and Personality Styles
- The Party Exercise
- Assessment of Skills, Values, Interests, and Educational Subjects
- Anatomy of Discontent
- Self-Directed Search Inventory
- Work Groups (Dictionary of Occupational Titles (DOT) and Occupational Outlook Handbook)
- Sign-Up for Discover and Strong Campbell by individual appointment.

V. REQUIRED MATERIALS

- Sign-In Sheet
- Blackboard and Flipchart
- Handout Packets
- Self-Directed Search Inventory
- Strong Campbell Computer Inventory
- DOT
- Occupational Outlook Handbook

VI. PUBLICITY:

Information on the workshop is to be submitted to the I & R coordinator at least 1 to 2 months prior to the scheduled date of the workshop. Both primary and secondary marketing tools are to be utilized:

Primary marketing tools: Radio, TV spots, Plan-of-the-Day (POD), and Family Service Center (FSC) newsletter

Secondary marketing tools: Morale Welfare and Recreation (MWR), Temporary Lodging Accommodations (TLA), library, Navy exchange complex, bulletin boards, department head meetings, command representative briefings, central files, and fliers placed in appropriate areas.

VII. QUALITY CONTROL

The Transition Assistance Management Program (TAMP) manager will review evaluations after each workshop. Changes to the workshop will then be initiated as deemed appropriate by the TAMP manager. This workshop is to be updated annually.

SAMPLE CUSTOMER INFORMATION FORM

Date: ___________

Name: ____ **SSN:** ____________________
(Last) (First) (M.I.)

Status: _____ A/D _____ Reserves _____ Retired _____ Spouse/family member of military member

Date Entered Military: ___________ **Branch of Service:** ___________ **Rate/Rank:** ___________

Date of Separation/Retirement: ______________________ ☐ Voluntary ☐ Involuntary

Command/Command's Phone: ______________________________________/________________________

Home Address: ____

____

____ **Phone:** ______________________

Race: ____________________ **D.O.B.:** ____________________ **Sex:** __________________

Education: _____ Less than H.S. _____ H.S. Equivalent/GED _____ H.S. Diploma
_____ Some college _____ Vocational degree _____ Associate degree
_____ Bachelor's degree _____ Master's degree
_____ Other: ____

Marital status:_____ Dual military _____ Married _____ Never married _____ Separated
_____ Divorced _____ Widowed _____ Other: ________________________

Housing: _____ BEQ/BOQ _____ Gov. housing _____ Ship _____ Private housing

Relation to sponsor: _____ Self _____ Spouse _____ Child _____ Other family member

Children at home? _____ Yes _____ No **Single Parent?** _____ Yes _____ No

Your Spouse (if military) **Branch:** ______________________________ **Status:** _______________
Pay grade: ____________________________
Spouse's command: ____

ITEMS ON CONFIDENTIALITY CONDUCT

- All client sessions must be conducted in private offices.
- During intake, the client reads and signs the Privacy Act Statement.
- All potential client inquiries, client appointments, cancellations, and phone calls are handled in a manner that ensures confidentiality.
- Clients are not discussed in hallways, reception area, or any public place.
- Phone conversations with or about clients are conducted in private.
- Staff training regarding client confidentiality occurs on a regular basis.
- If a case is command referred, limited counseling information may be shared if relevant to the client’s performance of duty or in situations where the Privacy Act Statement applies.
- When an exchange of information with community agencies is required, a signed Release of Information form is obtained from the client.
- If audio or videotapes of client sessions are used for any purpose, the counseling staff will obtain explicit written consent from the client.
- Access to case records is restricted to authorized persons.
- All case records are kept in locked files, behind locked doors to ensure confidentiality.
- Case records are shredded after 2 years, except for Family Advocacy records, which are sent to the medical clinic after 2 years.

SAMPLE RESOURCE LIST
INFORMATION/TIPS ON FEDERAL EMPLOYMENT
(from Norfolk)

FEDERAL EMPLOYMENT BRIEFING

Presented by the U.S. Office of Personnel Management's Norfolk Service Center

INTRODUCTION:

How many times have you tried to find out how to locate and apply for a Federal job? Have you been told that you must take the "civil service examination" in order to be hired? It seems that everyone has a different idea about how the Federal employment process really works.

The Office of Personnel Management's Norfolk Service Center offers a unique opportunity to take the guesswork and confusion out of the hiring process. You can learn from the professionals who work with this system every day.

FEDERAL EMPLOYMENT BRIEFING:

Our 90-minute briefing covers such topics as:

- Automated Federal employment information systems.
- Searching and understanding how to apply for a Federal job.
- Difference between registers and actual vacancies.
- Special employment programs for veterans.
- How veterans preference is used in the employment process.

Our briefing is divided into two 45-minute parts. The initial segment covers how to research and compete for current and future Federal employment opportunities using a variety of automated systems and programs. This session offers excellent insight into how to conduct a Federal job search locally, by region, or even worldwide. The second phase of the briefing deals with veterans preference issues and special employment programs targeted to veterans.

This briefing is presented on the **fourth** Thursday of every month at 2:00 p.m. in Room 501. The location is at the Norfolk Federal Building, 200 Granby Street. Seating is on a first-come, first-served basis.

SAMPLE AGENDA WORKSHEET

TIME	ITEM	OBJECTIVE	TOOLS/ MATERIALS	WHO
½ hour	Awards	Get Award Ideas	Flipchart and markers	Jones
1 hour	Training Needs	Identify Training Needs	Flipchart and markers	Bergman
2 hours	Advertising	Identify Advertising Ideas	Flipchart and markers	Myer

SAMPLE SUCCESS STORIES

WE NEED YOUR SUCCESS STORIES!

The Transition Assistance Management Program (TAMP) relies on Congressional support for its existence and is being scrutinized very closely. We are continuously being asked to send "success stories" through our chain of command, all the way to President Clinton's office. Success stories are great examples of why TAMP funding should continue.

If your transition from military to civilian life has been eased by the TAMP staff or resources, please let us know how they helped. Did an employment or VA benefits counselor make a difference? Did a class help you make it through an important interview? Did a TAMP software program assist you in finding the right job, college, or university? Please take the time to fill in the information below and mail it to the address listed, FAX it to (360) 257-8061, or call us at (360) 257-6813. Your success stories may determine whether future veterans will have the TAMP advantage. Thank you for your support.

Martha Smith
TAMP Manager

(This information is forwarded to Washington, D.C. Please print clearly and complete all information as requested.)

Date February 21, 1996

Your name David Rosewood

Your post-separation address 662 Easter Main Avenue
Harbortown, WA 29688

Phone # (603) 555-1212 Separation Date May 1, 1996

Check one: Interviewed _____ Hired X Started own business _____
Accepted at college/university _____ Other _____

Type of Job (general title) maintenance mechanic

Company/college Ocean Side Mechanics

Location Beaconville, WA

Comments A special thank you to Chief of Naval Operations for his support of the Navy sponsored Transition Assistance Program. It is one of the most outstanding workshops that I have attended in my 30 years of Naval service, for veterans, retiring Navy personnel, and spouses. Staff personnel and manager for the Transition Assistance Program at Naval Air Station Whidbey Island, WA, can be proud of the program that they have worked so hard on to ensure the information presented is the most accurate and best available. Information that I received was most helpful to me gaining employment. Five applications were sent out for employment; the first two were for part-time employment, and three, four, and five were for full time. I interviewed for the third and was hired for full-time employment. I have received notice for an interview for the fourth application submitted. Ask me about the Navy sponsored Transition Assistance Program.

SAMPLE SUCCESS STORIES (Continued)

U.S. NAVY
TRANSITION ASSISTANCE MANAGEMENT PROGRAM
SUCCESS STORY

Member Identification Not given	Code Number 96-018.WPD	Submission Date 21 Feb 1996
Date of Separation Mar 1996	Transition Site Whibdey Island, WA	

How the Navy Transition Assistance Management Program Helped —

I wanted to pass along some customer feedback to you as well as my personal career transition experience. I am separating from active duty in March. Despite having attended the Executive TAP seminar in October, I failed to begin development of my transition plan in earnest until January. Immediately feeling that I was behind the power curve and that my plan lacked a clear sense of direction, I became a regular customer at the Family Service Center. I attended and benefited from every transition class, seminar, and counseling offered, and put your resource library to good use. The TAMP staff provided me extensive guidance and invaluable advice throughout this period. Never once did they see me without taking the time to ask about my job search, then with a genuine interest, offer constructive advice or counsel.

I suppose my story could end here and everyone would be pleased that I left a satisfied customer, despite not yet having landed a job. I'm happy to report that this is not the case. If I heard the term "network" once from the TAMP staff, I heard it 100 times. I honestly believe, as do they, that networking is vital to a successful job search. Last week, after surviving a 3-hour and another 2-hour in-person interview in addition to a 30-minute phone interview with the company vice president, I was offered the Program Manager position with a San Diego-based company who runs the base operating support contract at Barbers Point. On Friday, after negotiating a counter-offer, I accepted the position. The real point I want to make is that I initially became aware of this "hidden market" job opportunity via a phone call home from the TAMP staff.

After receiving so much personal attention, I would be remiss if I didn't formally pass along my sincere gratitude to them, via you. They took a totally unprepared customer, and in a manner of less than 2 months, assisted in refining my resume, taught me about networking and conducting thorough company research, taught me how to dress, how to interview, and lastly, how to negotiate a counter-offer. These skills are like a puzzle, no one piece any more important than another, but without them all, the puzzle is incomplete.

You have a wonderful, dedicated staff. Please pass along my appreciation to each of them.

QUARTERLY REPORT
Transition Assistance Management Program (TAMP)
Reporting Requirements

1. The reporting format discussed in this Chapter should be reproduced locally, (delete BUPERS provided instructions for completing this report) the requested data inserted in the places provided and forwarded with an appropriate covering letter to the chain of command in sufficient time to reach BUPERS (Pers-662) in accordance with the following schedule:

Reporting Period	Due at BUPERS
1st Quarter (Oct-Dec)	15 Jan
2nd Quarter (Jan-Mar)	15 Apr
3rd Quarter (Apr-Jun)	15 Jul
4th Quarter (Jul-Sep)	15 Oct

Although the responsibility for submission of this report rests with Transition Sites, the accuracy of the data is dependent upon the timely submission of data from individual commands. Commanding officers should ensure accurate and timely feeder reports are generated and provided to the respective Navy Transition Site.

[Date]

MEMORANDUM FOR THE MANAGER, TRANSITION ASSISTANCE MANAGEMENT PROGRAM (PERS-662C)

Via: (1) **[Chain of Command]**

Subj: QUARTERLY REPORT ON THE STATUS OF TRANSITION BENEFITS AND SERVICES

Ref: (a) DASD (PSF&E) memo of 1 Nov 1993

Encl: (1) **[NAME OF REPORTING TRANSITION SITE]** Transition Assistance for Military Personnel Quarterly Report,
RCS: DD-P&R(Q) 1927 for the period **[i.e., January- March 1996]**

1. Enclosure (1) provides transition information for Second Quarter of FY-96 per reference (a).

[Signature Block]

[NAME OF REPORTING TRANSITION SITE]
TRANSITION ASSISTANCE FOR MILITARY PERSONNEL
QUARTERLY REPORT, RCS: DD-P&R(Q) 1927

1. Installation-level program staffing:

a. Position Title:

- Employment status: (choose one)
  - Part time, temporary or term
  - Full time, temporary or term
  - Part time, permanent
  - Full time, permanent
  - Collateral duty
  - Contracted
- Grade/Step/Series of incumbent:
- Date Reported:
- Vacancy Status:
- Position Funded by:
- Compensation
  - Base Pay:
  - Benefits:
  - COLA:
  - Annual Total:
  - Monthly total:
- Months position filled:
- Total Cost:
- % Time spent in TAMP:
- Funding other than OSD Spent in support of TAMP:

[Repeat this subparagraph as necessary to report each TAMP position at your Site.]

2. Preseparation counseling status.

a. Total number of service members receiving preseparation counseling this quarter: **[Number provided by each command in your catchment area and is from their tabulation of completed DD Form 2648's during this reporting period. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]**

USN	USA	USAF	USMC	USCG	TOTAL

Percent of Service members receiving preseparation counseling at least 90 days prior to separation: %.

[Number provided by each command in your catchment area and is from their tabulation of completed DD Form 2648's during this reporting period. Include Preseparation Counseling briefings accomplished by the Transition Manager and/or

Enclosure (1)

Representatives. Roll all of the inputs into a single number represented as a percentage of the numbers reported in 2.a.]

Number of spouses attending preseparation counseling:
[Number provided by each command in your catchment area and is a count of spouses who attended Preseparation Counseling briefs conducted during this reporting period. Include Preseparation Counseling briefings accomplished by the Transition Manager and/or Representatives.]

b. Number of Service members requesting an Individual Transition Plan:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 1 on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

c. Number of Service members requesting follow-on counseling on the effects of a career change:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 2 on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

d. Number of Service members requesting employment assistance follow-on counseling:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 3 (all subparagraphs) on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

Number of spouses requesting employment assistance counseling:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 3 (all subparagraphs) on DD Form 2648's completed by spouses. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

Enclosure (1)

Total customer count of Service members utilizing employment assistance:
[This number should reflect each Service member who comes into your Transition Site. Count each member, each time they come in.]

Total customer count of spouses utilizing employment assistance:
[This number should reflect each spouse (and immediate family members) who comes into your Transition Site for employment related assistance. Count each spouse, each time they come in. Don't forget to check with SEAP for their numbers.]

e. Number of Service members requesting follow-on relocation assistance counseling:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 4 (all subparagraphs) on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

Number of spouses requesting relocation assistance counseling:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 4 (all subparagraphs) on DD Form 2648's completed by spouses. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

f. Number of Service members requesting follow-on education and training counseling:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 5 (all subparagraphs) on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

g. Number of Service members requesting health and life insurance follow-on counseling:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 6 (all subparagraphs) on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

Enclosure (1)

Number of spouses requesting health and life insurance counseling:
[Number provided by each command in your catchment area and is from their tabulation of answers to question 6 (all subparagraphs) on DD Form 2648's completed by spouses. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

h. Number of Service members requesting financial follow-on counseling:
[Provided by each command in your catchment area and is from their tabulation of answers to question 7 (all subparagraphs) on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

Number of spouses requesting financial counseling:
[Provided by each command in your catchment area and is from their tabulation of answers to question 7 (all subparagraphs) on DD Form 2648's completed by spouses. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

i. Number of Service members requesting National Guard and Reserve affiliation follow-on counseling:
[Provided by each command in your catchment area and is from their tabulation of answers to question 8 on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

j. Number of Service members requesting disabled veterans follow-on counseling:
[Provided by each command in your catchment area and is from their tabulation of answers to question 9 (all subparagraphs) on completed DD Form 2648's. Include Preseparation Counseling Checklist's that may have been accomplished by the Transition Manager and/or Representatives.]

USN	USA	USAF	USMC	USCG	TOTAL

3. DOD and DOT civilians.

a. Number of Department of Defense and Department of Transportation civilians utilizing employment assistance counseling:
[This number should reflect each DOD and DOT civilian who comes into your Transition Site. Count each member, each time they come in. Report each civilian under the Service for which they work.]

Enclosure (1)

USN	USA	USAF	USMC	USCG	TOTAL

b. Number of family members of Department of Defense and Department of Transportation civilians utilizing employment assistance counseling:
[This number should reflect each family member of a DOD and/or DOT civilian who comes into your Transition Site. Count each member, each time they come in. Report each civilian under the Service for which the sponsor works. Don't forget to get numbers from SEAP.]

USN	USA	USAF	USMC	USCG	TOTAL

4. Outreach efforts.

a. Number of information briefings about transition assistance provided to installation personnel: Number of personnel attending:

b. Number of briefings about transition assistance provided to local community officials: Number of personnel attending:

c. Number of briefings about transition assistance provided to local community employers: Number of personnel attending:

d. Number of installation mass media articles about transition published or aired:

e. Number of community mass media articles about transition published or aired:

5. Job fairs.

a. Number conducted this quarter:

b. Estimated number of attendees:

c. Number of employers attending:

d. Number of jobs offered:

6. TAP Classes

a. Number of TAP classes conducted:
[Include the number of TAP classes conducted during the quarter being reported]

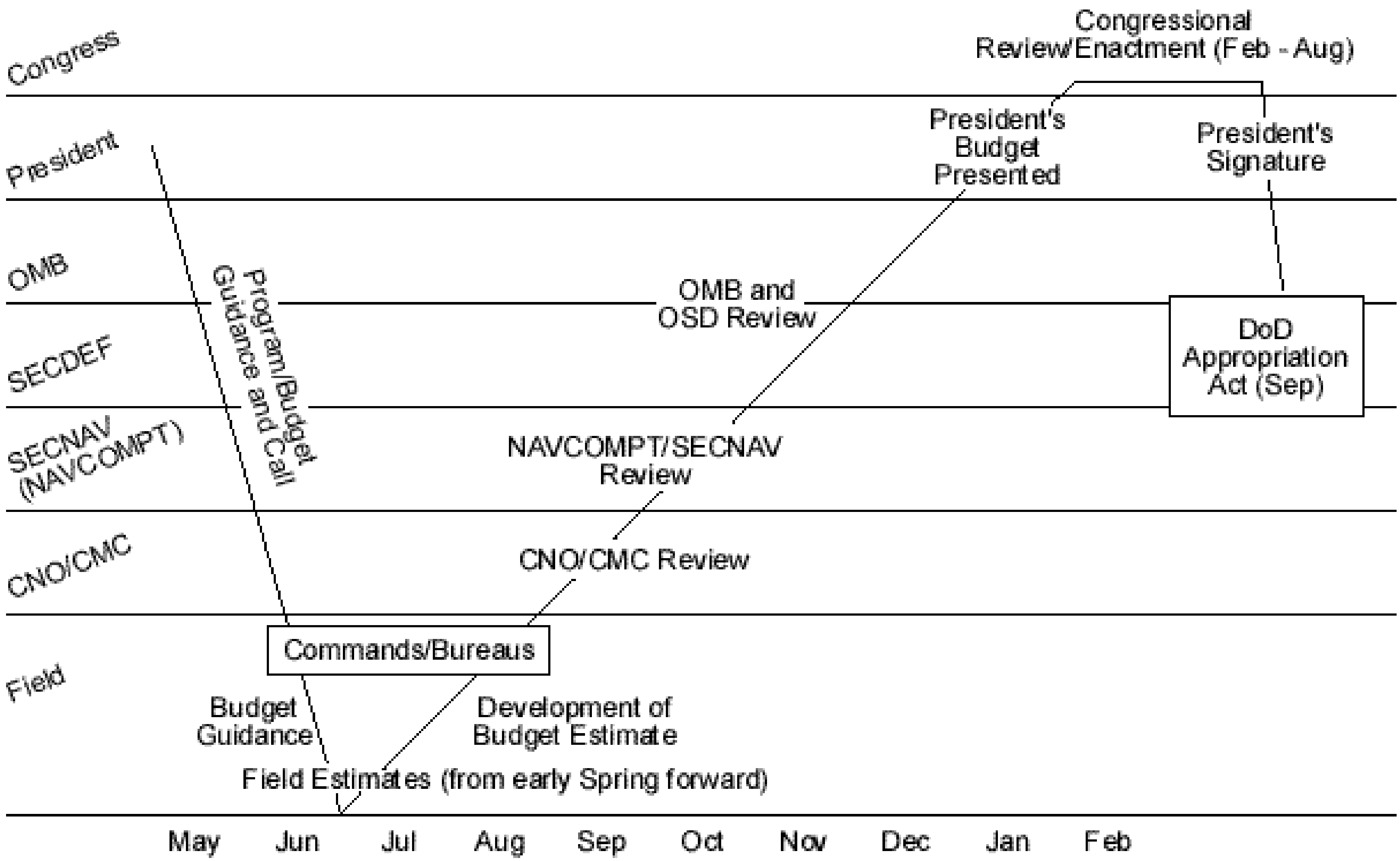
Enclosure (1)

b. Number of TAP class attendees:
[Report only number of people who attended the classes reported in 6a., and only the attendance on the first class day]

7. Youth Volunteer Hours – **(enter the number of youth volunteer hours performed during this reporting period. This information should be obtained from your MWR department)**

Enclosure (1)

BUDGET FORMULATION



SAMPLE UNFUNDED REQUEST

FSC NAME:	FSC Mayport
PREPARER'S NAME/PHONE NUMBER:	Jean Peterson/(705) 555-1212
PROGRAM:	RAP
FUNDING REQUIREMENTS:	Duplex printer
FUNDING REQUIRED:	$5,000

NARRATIVE DESCRIPTION OF REQUIREMENT:

In 1993, the Office of Assistant Secretary of Defense, in support of Public Law-189, National Defense Authorization Act of FY 1990 and 1991, directed the Navy to implement the Standard Installation Topic Exchange Service. This service, provided by 84 Family Service Centers world-wide, provides relocation assistance for the 198,000 personnel and families that PCS transfer each year.

SITES, a personal computer-based application, provides the member with a booklet containing relocation information about the installation concerned. The booklet is printed 2-sided, and is personalized for the member's use. Printing of the booklet can be accomplished on a single-sided printer, but requires extensive operator intervention. To effect printing on a single-sided printer, the operator must print one side of the document, retrieve the printed pages, reverse the order, reinsert the pages, and direct the application to print the reverse side. The average time to print the complete booklet is approximately 5 to 15 minutes. The printing time would be lengthened in a situation where the printer is not co-located with the computer (i.e., Local Area Network (LAN)). Conversely, the use of a two-sided or duplex printer requires approximately 2 to 3 minutes to print a booklet, with no operator intervention.

The purchase of duplex printers will greatly increase the ability of the Navy Family Service Center to provide the congressionally mandated service.

SAMPLE SOW

STATEMENT OF WORK FOR
INTERAGENCY AGREEMENT BETWEEN
U.S. OFFICE OF PERSONNEL MANAGEMENT AND
THE BUREAU OF NAVAL PERSONNEL (PERS-662)

BACKGROUND

The Transition Assistance Management Program (TAMP), is a part of the Transition, Relocation, and Deployment Support Branch of the Personal, Family, and Community Support Division of the Personal Readiness and Community Support Department of the Bureau of Naval Personnel. The TAMP staff plans and directs the implementation of the Navy's transition assistance program. In October 1995, the House Appropriations Committee targeted TAMP for elimination. The Department of Defense submitted a rebuttal stating that reengineering is the best approach. The Navy convened the TAMP extended working group to look at new program directions. They developed the Career Options and Navy Skills Evaluation Program (CONSEP) which will assist in all transitions throughout the military lifecycle. The mission of the program is to increase retention and mission readiness by providing professional career development resources to the military community throughout their career lifecycle, culminating with emphasis on the transition from the military to civilian workforce.

SETTING

To accomplish their assigned objective, the TAMP staff oversees implementation of employment services, opportunities, and programs through an expanding worldwide network of Family Service Centers which have three basic functions: information and referral, education and training, and counseling. Family Service Centers are located at all major U.S. Naval installations and are staffed by active duty personnel, Federal employees, and some contract staff who are specialists in a variety of programs and functions related to employee and family support.

TRAINING REQUIREMENTS

In order to test CONSEP, curricula must be developed for the mid-career and the senior phases of training. In order to accommodate this need, the facilitators of these courses of instruction require training materials to be developed which address the areas of Navy career development and personal planning. Each of these classes will be 5 full days.

SAMPLE SOW (Continued)

TARGETING TRAINING POPULATION

The target training population will be military members between 6-12 years of active service for the mid-career course and 18+ years of active service for the senior course. Training will be provided at major fleet concentration areas (approximately 10 sites).

DURATION OF PROJECT

The intent is to develop and provide the deliverables for the mid-career and senior courses of instruction. Work on the curricula will begin on 1 June 1997.

DELIVERABLES

The outcome will be to develop curricula for two 5-day courses of instruction.

SCHEDULE

- Convene small group of officers and enlisted personnel to brainstorm curriculum within 30 days of contract award.

- Assess group feedback and develop first draft within 60 days of contract award.

- Train with first draft within 90 days of contract award.

- Assess comments/feedback and develop final product within 145 days of contract award.

SAMPLE
MEMORANDUM OF UNDERSTANDING (MOU)

Among

AIR FORCE DISTRICT OF WASHINGTON
NAVAL DISTRICT OF WASHINGTON
DEPARTMENT OF VETERANS AFFAIRS
DEPARTMENT OF LABOR

PURPOSE: This Memorandum of Understanding (MOU) among the Air Force District of Washington (AFDW), Naval District of Washington (NDW), U.S. Department of Veterans Affairs (VA), and Department of Labor (DOL) sets forth the conditions, stipulations, and responsibilities for initiating and/or continuing the Transition Assistance Program (TAP) at Bolling Air Force Base.

BACKGROUND: The DOL TAP provides instruction, information, and assistance to members of the Armed Forces who are within 180 days of separation and their spouses, in this order of priority, on a regularly scheduled basis at locations designated by the Department of Defense (DOD). The aim of the program is to provide the veteran with the skills which will decrease the time unemployed and the information to make a suitable educational or career choice. Its objectives are the prevention of long-term unemployment problems, enhanced employment services to the disabled and younger veterans who are most likely to encounter employment difficulties, improved active component retention, enhanced reserve component placement, and improved perception of service members at separation.

DEFINITIONS: For the purpose of clarification the definitions are as follows:

Transition Assistance Program (TAP): Established as a joint program among DOL, DOD, and VA to provide employment and training information to service members within 180 days of separation.

Transition Assistance Management Program (TAMP): Established by the DOD as an umbrella program to coordinate implementation of congressionally directed transition benefits/services.

SAMPLE (MOU) (Continued)

Facilitator: Person trained at the National Veterans' Training Institute (NVTI) or other entity approved by the National Office of the Veterans' Employment and Training Service (VETS) whose primary duty is presenting instruction and providing administrative support for the 3-day workshop.

Coordinator: Person who has the responsibility for class scheduling and logistics.

Point of Contact (POC): Representative of each of the partners who is charged with carrying out that partner's responsibilities.

(Installation POC and coordinator will be the TAMP Manager.)

ELIGIBILITY: Military personnel and their spouses whose estimated separation or retirement date is within 180 days. Separated personnel/retirees and their spouses will be accepted on a space-available basis.

RESPONSIBILITIES: Program delivery leadership for TAP is concentrated in DOL. Participation of service member and logistic control is vested in DOD. Program authority in regard to instruction on veterans' rights, benefits, and obligations will be provided by VA.

All parties involved agree:

* To work together to achieve TAP goals and to resolve conflicts at lowest level possible.
* To establish frequency of workshops in accordance with available resources and number of separations.
* To avoid duplication of programs by AFDW and NDW cosponsorship.
* To coordinate the support services available in the local community (other public agencies, military and veterans' service organizations, and the private sector).
* To identify additional resources required to effectively implement and maintain a fully operational TAP/Disabled Transition Assistance Program (DTAP) and take the necessary action to obtain those resources.

DOD Installations will provide:

1. Coordination by AFDW and NDW TAMP Manager with the POC's from DOL and VA.

SAMPLE (MOU) (Continued)

2. Notification and registration of participants.

3. Ongoing publicity such as, but not limited to, posters and fliers.

4. Encouragement and promotion of maximum participation as stated in Public Law 101-510, Sec. 1144.

5. Secondary source of qualified facilitators.

6. Supervision of the facilitators provided by the installation.

7. Maintenance of classroom discipline.

8. Monitoring of TAP workshops' delivery to maintain a quality program.

<u>AFDW will provide</u>:

1. Suitable classroom facilities on a regularly scheduled basis. Such facilities must include utilities (adequate lighting, air conditioning, heat, etc.), male and female restrooms, furniture (tables, chairs, lectern, etc.), handicapped accessibility, and sufficient parking.

<u>NDW will provide</u>:

1. A backup classroom facility as needed. Such facility must include utilities (adequate lighting, air conditioning, heat, etc.), male and female restrooms, furniture (tables, chairs, lectern, etc.), handicapped accessibility, and sufficient parking.

2. Table coverings for tables.

3. Manpower to set up and dismantle classroom facilities.

<u>DOL VETS will provide</u>:

1. Primary source of qualified facilitators to staff the workshops.

2. Facilitator has the option of bringing in guest speakers to supplement the seminar.

3. Facilitator will be responsible for the management of guest speakers.

4. The State Director of Veterans' Employment and Training Service (DVET) as the POC.

SAMPLE (MOU) (Continued)

5. All training materials required for the workshop (instructors manuals, slides/overheads, participant workbooks, etc.)

6. Training for facilitators.

7. Monitoring of TAP workshops' delivery to maintain a quality program.

8. Oversight of performance of DO: contractors to ensure proper performance of workshop facilitator functions.

<u>VA Veterans Services Division will provide</u>:

1. A POC to coordinate with the POC's from the other parties involved.

2. Guidance on the role of all veterans' service organizations.

3. Coordination with Vocational Rehabilitation and Education Service in implementing TAP/DTAP.

TAP ADVISORY COUNCIL: The installations' TAMP Managers, VAPOC, and DVET will meet quarterly to discuss program accomplishments, plans for the next quarter, and resolution of conflicts. The meetings will be chaired by the DVET.

TERMINATION: This MOU will automatically be renewed on the anniversary date unless 30 days' written notice of termination is given by any party. The agreement can also be terminated at any time upon 30 days' written notice by any party.

SIGNATURES:

________________________	________________________
JANE DOE, Director Veterans Employment & Training Department of Labor Date____________________	PAT N. MARINE, Director Department of Veterans Affairs Washington Regional Office Date____________________
________________________	________________________
ROBIN M. NAVY, Brig Gen, USAF Commander Air Force District of Washington Date____________________	Dick Sergeant, Rear Admiral Commandant Naval District Washington Date____________________

SAMPLE EVALUATION OF COMMUNITY INTERACTION

After you meet or talk with someone who provides a resource in the community, take a few moments and fill out this form.

Name of Individual You Talked With: ______________________________

Organization: ______________________________

Brief Description of Programs/Services:

____

____

1. Do you think that their needs and resources provide a match with yours?

   ☐ YES ☐ NO

2. How can this individual/organization benefit the CDRC? (Or, what do you hope to gain from this relationship?)

____

____

3. How can the CDRC benefit this individual/organization? (Or, what do they hope to gain from you?)

____

____

4. Can anyone else in the FSC benefit from this relationship?

   ☐ YES ☐ NO If yes who?

____

____

MARKETING PLAN NOTES

Goal:

Objective:

Target Audience(s):

Message(s):

Media:

Page 1

MARKETING PLAN NOTES (Continued)

Tasks:

Page 2

ACRONYMS

Acronym	Meaning
ACOR	Alternate Contracting Officer Representative
ADP	Automated Data Processing
AFDW	Air Force District of Washington
AJB	American Job Bank
ASD	Assistant Secretary of Defense
ASD (C)	Assistant Secretary of Defense
A/V	Audio/Visual
BAQ	Basic Allowance for Quarters
BEQ	Bachelor Enlisted Quarters
BOQ	Bachelor Officer Quarters
BRAC	Base Realignment and Closure
BUPERS	Bureau of Naval Personnel
BY	Budget Year
CARIT	Career Information Team
CCC	Command Career Counselor
CCTV	Closed Circuit Television
CDRC	Career Development and Resource Center
CHAMPUS	Civilian Health and Medical Program of the Uniformed Services
CMC	Command Master Chief
CNO	Chief of Naval Operations
CO	Commanding Officer
COL	Cost of Living (index)
CONUS	Continental United States
COR	Contracting Officer Representative

ACRONYMS (Continued)

Acronym	Meaning
CPU	Central Processing Unit
DOD	Department of Defense
DODDS	Department of Defense Dependents Schools
DODINST	U.S. Department of Defense Instruction
DOL	Department of Labor
DON	Department of the Navy
DORS	Defense Outplacement Referral System
DTAP	Disabled Transition Assistance Program
DTF	Dental Treatment Facility
DVET	Director of Veterans' Employment and Training Service
EAOS	Expiration of Active Obligated Service
ESO	Educational Services Office
FISC	Fleet Industrial Supply Center
FMP	Force Management Policy
FSC	Family Service Center
FY	Fiscal Year
GNT	General Navy Training
GPRA	Government Performance and Results Act
HAC	House Appropriations Committee
HASC	House Armed Services Committee
HHG	Household Goods
HRO	Human Resource Office
ICLP	Individual Career Life Plan

ACRONYMS (Continued)

Acronym	Meaning
ICR	Intercultural Relations Program
ID	Identification
INDOC	Indoctrination
IRR	Individual Ready Reserve
ITP	Individual Transition Plan
IVR	Involuntarily Retired
IVS	Involuntarily Separated
KSA	Knowledge, Skills, and Abilities
LAN	Local Area Network
MGIB	Montgomery G.I. Bill
MOA	Memorandum of Agreement
MOU	Memorandum of Understanding
MTF	Medical Treatment Facility
MWR	Morale Welfare and Recreation
NAFI	Non-Appropriate Fund Instrumentalities
NAVCOMPT	Navy Comptroller
NAVPTO	Navy Passenger Transportation Office
NDW	Naval District of Washington
NMCRS	Navy Marine Corps Relief Society
NVTI	National Veterans’ Training Institute
OCONUS	Outside the Continental United States
OJT	On-the-Job Training
OMB	Office of Management and Budget

ACRONYMS (Continued)

Acronym	Meaning
OPF	Official Personnel Folder
OPNAVINST	(Chief) Naval Operations Instruction
OSD	Office of the Secretary of Defense
PACS	Public and Community Service
PAO	Public Affairs Office (or Officer)
PBD	Program Budget Decision
PCS	Permanent Change in Station
PFM	Personal Financial Management (Program)
POA&M	Plan of Action and Milestones
POC	Point of Contact
POD	Plan-of-the-Day
PSA	Public Service Announcement
PSD	Personnel Support Detachment
PTAD	Permissive Temporary Additional Duty
QOLMIS	Quality of Life Management Information System
RACC	Relocation Assistance Coordinating Committee (see TACC, TRACC)
RAP	Relocation Assistance Program
RFP	Request for Proposal
SAC	Senate Appropriations Committee
SASC	Senate Armed Services Committee
SBA	Small Business Administration
SEAP	Spouse Employment Assistance Program
SEC	State Employment Commission

ACRONYMS (Continued)

Acronym	Meaning
SECNAV	Secretary of the Navy
SECNAVINST	Secretary of the Navy Instruction
SELRES	Selected Reserve
SITES	Standard Installation Topic Exchange Service
SOFA	Status of Forces Agreement
SOP	Standard Operating Procedure
SOW	Statement of Work
SPD	Separation Program Designator
SSB	Special Separation Benefit
SSN	Social Security Number
TACC	Transition Assistance Coordinating Committee (see RACC, TRACC)
TAD	Temporary Additional Duty
TAID Card	Transition Assistance Identification Card
TAMP	Transition Assistance Management Program
TAP	Transition Assistance Program (workshop)
TBB	Transition Bulletin Board
TLA	Temporary Lodging Accommodations
TQL	Total Quality Leadership
TRACC	Transition Relocation Assistance Coordinating Committee
U.S. VIP	Uniformed Services Voluntary Insurance Plan
VA	U.S. Department of Veterans Affairs
VEAP	Veterans' Education Assistance Program
VETS	Veterans' Employment and Training Service
VHA	Variable Housing Allowance

ACRONYMS (Continued)

Acronym	Meaning
VIP	Voluntary Insurance Plan
VMET	Verification of Military Experience and Training (DD Form 2586)
VSI	Voluntary Separation Incentive
XO	Executive Officer